

## **PM02a: Home Provider**

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**January 6, 2006**

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This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>).

## **1.1. Introduction**

There are two types of providers in eWiSACWIS, Home Providers and Private Providers. The PM02a Home Provider topic is the case file for home providers which include foster homes, treatment foster homes, adoptive homes and relative (Kinship) homes. This topic provides the basis for a Home Provider record that will help DCFS staff see at a glance the most current information that the department has about the homes.

The responsibility for the management of each Home Provider **that is not a Treatment Foster Home** is allocated to a specific county - referred to as the Home Provider's 'Designated County'. Initially, the county of the worker/supervisor creating the provider record (i.e. screening-in the Home Inquiry), is captured as the Designated County. Thereafter, the Designated County can be changed via the Create Physical Address page, discussed in the PM08 Address Maintenance topic paper. The Designated County is not recorded on any of the Home Provider page tabs. It can be viewed from the provider record on the Desktop and on the physical address page. The Designated County may differ from the Home Provider's physical location.

Workers of the Home Provider's Designated County manage all aspects of the Home Provider record, including licensing, addition of service types, address changes, and change of designated county. Designated County workers are able to select and add service category and types for other counties to Home Provider records. Although workers from other counties may have open assignments to a Home Provider record, their access to the record and ability to create work for the Home Provider is limited. The county of the worker accessing the provider record will always be screened to establish whether or not it matches the Designated County.

**Treatment Foster Homes are not subject to the designated county rules. These providers are created and managed by workers who have been granted security rights to create and maintain treatment foster home providers, regardless of the worker's county or the Provider's designated county. Security is granted when the Create/Maintain Treatment Foster Home checkbox is checked on the worker's user group. Workers without Treatment Foster Home security have limited access to Treatment Foster Home Providers and Treatment Foster Home licenses.**

**This information in this topic paper describes access to Home Provider records available to a worker that is either from the Designated County (in the case of non-TFH Providers) or has Treatment Foster Home security access, along with an open assignment to the provider record, and appropriate security access levels. Access limits applied to non-Designated County or non-Treatment Foster Home workers are defined in appropriate sections throughout the main body of the topic paper.**

All references to the creation of work by workers carry the assumption that the workers have the appropriate security levels and an open assignment to the Provider record.

The following Tabs are available while maintaining the Home Provider records:

- Home
- Members
- Characteristics
- Services
- Training

The Home tab displays and maintains location and contact information about providers of family-based care in a home setting. Information such as Emergency Contacts, Primary Language, Marital Status, Electronic Funds Transfer, and County are documented here and can be updated at any time. The Electronic Funds Transfer (EFT) information, located in the Electronic Funds Transfer expando, allows the worker to complete the steps required for automated direct deposits of payments to the provider.

The Home Tab is also used to launch (via the Options drop down box) the Parent Agency History and Provider Repayment Method pop-up pages. The Parent Agency History pop-up page allows the worker to add a Parent Agency or to change an existing Parent Agency for the provider. The Provider Repayment Method pop-up page is used to specify the method used to recoup any overpayments made to this provider (refer to FM02b: Overpayment Adjustments topic for more details). Each county specifies the repayment methods.

The Members Tab displays information about individuals residing at the physical location of the home, including all household members, such as parents, birth children, relatives, non-relatives, and children currently under placement in that home. The worker can deactivate, reactivate, add or remove a person from the Members tab, either through the hyperlinks located to the right of each home member record or via the Insert button in the Home Members group box. The payee name(s) field is also located on this tab. Information about children who are currently in placement with the home is viewable from this tab.

The Characteristics Tab allows the worker to record helpful information that assists the worker when making placement decisions for a child. The Characteristic Tab includes what the Family Accepts and what Other Family Characteristics the Providers have. The Family Accepts list box displays information about the characteristics of children that the family is willing to accept for potential placement in the home. This includes preferences, restrictions, and assessments, and can be identified as searchable criteria at the time of completing a provider service search. The Other Family Characteristics list box lists contains those characteristics of the home that may affect a decision to place a child there; this information may not be identified as searchable criteria at the time of completing a provider service search.

The Services Tab maintains current information about the specific services offered by a home provider. A home provider's total bed capacity, as well as gender preferences, placement counts, reservation counts, and current vacancies are stored at the provider level. These statistics can also be derived at the service level. From the Edit Unlicensed Services hyperlink on the Services tab, a worker can associate unlicensed service types to a provider. Statuses and capacities can be modified on this page for these service types. Licensed services are viewable on the Services tab, though modifications to these services are conducted on the Home

Provider License. Additional information regarding licensed services can be found in the *PM04a: Home Provider Licensing* topic paper.

Regardless if a service is unlicensed or licensed, the appropriate rate page can be launched from the Options drop down box on the Services tab. If the service type requires a provider specific rate (SERVICE\_TYPE.fl\_prvd\_rate = 'Y'), the worker will be taken to the Provider Service Rate page. If the selected service type requires a service specific rate (SERVICE\_TYPE.fl\_prvd\_rate = 'N'), the worker will be taken to the Service Rate page (documented in the *PM01: Maintain Services* topic paper). Also accessible from the Options drop down box is the Bed Reservation value.

The Training Tab documents information about training classes and training. The worker is able to add new training classes to the Provider's record by selecting the Insert button and maintain existing training records directly on the tab. The Date Complete field will determine the order that the training courses are displayed on the Home Provider Training Tab. This will aid the worker in assessing the training needs and training history of the Provider. The worker can send the Provider a letter regarding specific training information using the Training Letter template and/or track training checklist items via the Provider Training Checklist page, both of which are accessed from the Options drop down box on this tab.

## 1.2. Pages

### 1.2.1. Page – Home Provider

**Home Provider - Microsoft Internet Explorer provided by DHFS**

**eWiSACWIS** Print Spell Check Help

**Basic**

Number: 20190 Name: Sally Safety Type: Foster Home Status: Active

Lcns. Type: Licensed by State of WI Lcns. Agency: Unknown HSRS Number: 2204020190

**Home** Members Characteristics Services Training

**Home Information**

**Parent 1:** Sally Safety  
C/O:  
Street: 640 Elk Drive Apt:  
City: Milwaukee State: WI Zip: 53201  
Country: United States

**Parent 2:** Bob Safety  
Home: (414)789-4651 Ext:  
Work: Ext:  
Fax:

**Emergency Contact Information**

Name: Phone: Ext: Name: Phone: Ext:

**Further Information**

Primary Language: English ☐ EFT  
**Marital Status:** Single Female ☐ 1099 Form Required  
County: Milwaukee ☐ FEIN ☐ SSN ☒ N/A  
Parent Agency: Sally Safety

**County Provider ID**

County	Provider ID	Delete

Options: Go Save Close

Done Local intranet

#### 1.2.1.1. Home Provider Page Overview

##### Navigation

The Home Provider page can be accessed through the Providers expando on the Desktop by selecting the Provider Name hyperlink or through the Create Provider Work page by anyone who is assigned to the provider. On the Create Provider Work page, the user must select the 'Maintain Provider' value from the Maintenance drop down box in the Create Provider Items group box.

The Home Provider page can also be launched via the Utilities Search page, Provider Organization tab. After searching for a provider on the Provider Organization tab, the worker can select the provider name hyperlink to go the Provider Management pages.

When a non-Designated County worker accesses the Home Provider page, access restrictions apply. **When a non-Treatment Foster Home worker accesses the Home Provider page and the**

Provider type is Treatment Foster Home, access restrictions apply. These restrictions are discussed in detail in the Tab overview sections.

#### Page Summary

Upon the final acceptance of a Home Inquiry, documented in the *PM07: Home Inquiry* topic paper, a home provider organization record is created. The new home provider has an initial status of active and forms the basis for the Home Provider page. The Inquiry Type as documented in *PM07: Home Inquiry* will determine the provider type.

The Home Provider page contains demographic, home member, characteristic, service, and training information specific to the provider. All home provider data can be updated on this page, with the exception of licensed services, which are maintained via the Home Provider License page. Information pertaining to the specific home members in the household is added to the home members' Person Management record that is accessed from the Members tab. This is discussed in greater detail within the Members tab section of this document.

#### **1.2.1.2. Page Information**

**Box:** Basic

<b>Fields:</b>	Number:	The unique ID number assigned to the specific Home Provider; System derived; Not user editable; No default value.
	Name:	The name of the home provider; System derived from home member identified as Parent 1; Not user editable; Defaults to home member identified as Parent 1 during the Home Inquiry.
	Type:	The type of the provider (Foster Home, Treatment Foster Home, Adoptive Home); User selected drop down box; Required; Defaults to the value selected in the Inquiry Type drop down box on the Home Inquiry page. Treatment Foster Home value filtered out for non-TFH workers.
	Status:	The status of the Provider (Active, Inactive); User selected drop down box; Required; Defaults to 'Active' after the Home Inquiry record has been screened in by the supervisor.
	Lcns. Type:	The license type field for the provider; User selected drop down box; Required; Defaults to 'Not Licensed'.
	Lcns. Agency:	The name of the agency responsible for issuing license; User entered text box; Required; No default value.
	HSRS Number:	The Human Services Reporting System's unique number; System Derived; Not editable; Not required; No default value.

#### **1.2.1.3. Background Processing**

1. The Name field is derived from the home member selected as 'Parent 1' in the Role drop down box on the Member tab of the Home Inquiry page (PM07: Home Inquiry).
2. The Type field value is derived from the Inquiry Type value selected on the Basic tab of the Home Inquiry page (PM07: Home Inquiry).



- a. If the value selected in the Inquiry Type field is 'Adoption- Foster Parent Applicant', 'Adoption- ICPC', 'Adoption-New Applicant', or 'Adoption- Relative Applicant', the Type field on the Home Provider record defaults to 'Adoptive Home'.
  - b. If the value selected in the Inquiry Type field is 'Foster Care', 'Foster Care- ICPC', or 'Relative Foster Care', the Type field on the Home Provider record defaults to 'Foster Home'.
  - c. If the value selected in the Inquiry Type field is 'Kinship Care', the Type field on the Home Provider record defaults to 'Kinship Care Home'.
  - d. If the value selected in the Inquiry Type field is 'Treatment Foster Home', the Type field on the Home Provider record defaults to 'Treatment Foster Home'.
  - e. If the value selected in the Inquiry Type field is 'Relative,' the Type field on the Home Provider record defaults to 'Relative.'
3. Upon supervisory screen in of the Home Inquiry record, the Status drop down box defaults to 'Active'.
  4. Upon launching of the Home Provider record, the county of the worker accessing the page (WORKER.CD\_OFC\_DIV) is compared to the Home Provider's designated county (PROVIDER ORG.CD\_DES\_CNTY). or;
  5. When the Provider is a Treatment Foster Home provider, the worker's user group is validated.

#### 1.2.1.4. Save Processing

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if they would like to 'Save changes before closing the page.'
2. If the Status drop down box is set to 'Inactive' and the home provider has active services, on save processing, the worker will be prompted with a notification message stating "All service records will be set to Inactive. Do you wish to continue?". If the worker selects 'Yes' to this message, active unlicensed and licenses services are changed to inactive and the Home Provider record is saved.
3. The Type, Status, Lcns. Type, and Lcns. Agency fields are required and cannot have a null value at time of save processing. If any of these fields are null, the user will receive an error validation stating "Please enter data in the fields which are highlighted - <field name>."
4. If on the Home Provider page, the Type dropdown is set to 'Duplicate' and the Status dropdown is set to 'Inactive', a message is thrown to alert the user that the action will freeze the Provider. "This will freeze the provider record and all provider services will be set to inactive. Do you wish to continue?" Once frozen you will not be able to reactivate the provider in the future.' Do you wish to continue?" If the user clicks the 'Yes' button, the Provider will be frozen and all services will be set to inactive.

#### 1.2.1.5. CRUD Matrix

Table Name	CRUD
PROVIDER_ORG	RU

1.2.2. Tab 1 - Home

Home Provider - Microsoft Internet Explorer provided by DHFS

**eWiSACWIS** Print Spell Check Help

**Basic**

Number: 20190 Name: Sally Safety Type: Foster Home Status: Active

Lcns. Type: Licensed by State of WI Lcns. Agency: Unknown HSRS Number: 2204020190

**Home** Members Characteristics Services Training

**Home Information**

**Parent 1:** Sally Safety  
C/O:  
Street: 640 Elk Drive Apt:  
City: Milwaukee State: WI Zip: 53201  
Country: United States

**Parent 2:** Bob Safety  
Home: (414)789-4651 Ext:  
Work: Ext:  
Fax:

**Emergency Contact Information**

Name: Phone: Ext: Name: Phone: Ext:

**Further Information**

Primary Language: English ☐ EFT  
**Marital Status:** Single Female ☐ 1099 Form Required  
County: Milwaukee ☐ FEIN   
Parent Agency: Sally Safety ☐ SSN   
☒ N/A

**County Provider ID**

County	Provider ID	Delete

Options:  Go

Done Local intranet

Home Provider - Microsoft Internet Explorer provided by DHFS

**eWiSACWIS** Print Spell Check Help

**Basic**

Number: 20190 Name: Sally Safety Type: Foster Home Status: Active

Lcns. Type: Licensed by State of WI Lcns. Agency: Unknown HSRS Number: 2204020190

**Home** Members Characteristics Services Training

Parent Agency: Sally Safety ☐ SSN ☒ N/A **Insert**

**Electronic Funds Transfer**

**Provider**

Provider ID: 20190 Provider Name: Sally Safety

Payment Method: ☒ Electronic Funds Transfer ☐ Check

**Pre-Note Information**

Pre-Note Status: No Request ☐ Pre-Note requested

Date Pre-Note Sent: Trace Number:

**Bank Information**

ABA Number: Account Number:

Bank Name:

Options: **Go** **Save** **Close**

Done Local intranet

Home Provider - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

**eWiSACWIS** Print Spell Check Help

**Basic**  
 Number: 9221119 Name: Kitty King Type: Duplicate Status: Inactive Search  
**Duplicate Provider - Please use 'King, Kitty' Provider ID 800000** HRSR Number:

**Home** Members Characteristics Services Training

**Home Information**  
**Parent 1:** Kitty King Parent 2: Brad King  
 C/O: Street: 100 Aubine Street Apt: Home: Ext:  
 City: Packwaukee State: WI Zip: 53953 Work: Ext:  
 Country: United States Fax:

**Emergency Contact Information**  
 Name: Phone: Ext: Name: Phone: Ext:

**Further Information**  
 Primary Language: English ☐ EFT  
**Marital Status:** Married Couple ☐ 1099 Form Required  
 County: Green ☐ FEIN  
 Parent Agency: Kitty King ☐ SSN  
☒ N/A

**County Provider ID**  

County	Provider ID	Delete
--------	-------------	--------

 Insert

Options: Go Save Close

Done Local intranet

### 1.2.2.1. Tab Overview

The Home tab displays location and contact information about providers of family-based care in a home setting. Home information such as the address and telephone numbers of the family are system derived from the person selected as Parent 1 during the Home Inquiry. General information such as Emergency Contacts, Primary Language, Marital Status, and County are documented here and can be updated at any time should changes be necessary. Provider IDs are maintained at the county level in the County Provider ID group box and EFT information is stored within the Electronic Funds Transfer expando.

The information in the Electronic Funds Transfer expando is used to document a provider's request to have their payments electronically deposited. The provider may have funds electronically deposited directly to bank accounts by providing the ABA Number and account number. The system will automatically default to checks that are generated and sent directly to the provider's mailing address. In the event the provider should want electronic funds transfers, the data in this expando records the pre-note request. The Designated County worker would request a pre-note from the provider wanting the direct deposit of payments. Once the pre-note information is confirmed and accepted, the Designated County worker selects the

Electronic Fund Transfer radio button in the Provider Group Box and payments will be deposited directly into the account when payments are made.

The Options drop down box, located on the bottom left side of the Home Provider page, contains access to text documents for the home provider, as well as to the Parent Agency History and Provider Repayment Method pages.

When accessed by a non-Designated County worker, all fields on the Home tab will be disabled (grayed-out). Additionally, all values selected from the Options drop down box will open in view only mode.

When a Treatment Foster Home is accessed by a non-Treatment Foster Home worker, all fields on the Home tab except for County Provider ID and the EFT will be disabled. The County Provider ID box displays a row for the worker's county, with the ID field enabled. The EFT fields are available if the non-Treatment Foster Home worker has the needed EFT security profile included in the user group.

Workers with appropriate security to perform duplicate provider cleanup work will be able to view an additional drop down value Duplicate in the Provider Type Dropdown. Upon selecting that value the header section is re organized as indicated in the bitmap. Please refer to the background processing and Save processing sections of the document for more information.

#### **1.2.2.2. Tab Information**

**Box:** Home Information

<b>Fields:</b>	Parent 1:	Name of home member designated as Parent 1 on the Members tab; System derived; Not user editable; Defaults to home member designated as Parent 1 on the Home Inquiry page; AFCARS value.
	Parent 2:	Name of home member designated as Parent 2 on the Members tab; System derived; Not user editable; Defaults to home member designated as Parent 2 on the Home Inquiry page.
	C/O:	“In Care Of”, the name of the physical address resident if different from Parent 1; System derived; Not user editable; Defaults to Parent 1’s C/O information from the Home Inquiry page.
	Street:	The street address of the home provider; System derived; Not user editable; Defaults to Parent 1’s Street information from the Home Inquiry page.
	Apt:	The apartment number of the home provider; System derived; Not user editable; Defaults to Parent 1’s Apartment from the Home Inquiry page.
	City:	The city where the home provider resides; System derived; Not user editable; Defaults to Parent 1’s City from the Home Inquiry page.
	State:	The state where the home provider resides; System derived; Not

		user editable; Defaults to Parent 1's State from the Home Inquiry page.
Zip:		The zip code where the home provider resides; System derived; Not user editable; Defaults to Parent 1's Zip Code from the Home Inquiry page.
Country:		The Country where the home provider resides; System derived; Not user editable; Defaults to Parent 1's Country from the Home Inquiry page.
Home:		Home phone number of the home provider; System derived; Not user editable; Defaults to Parent 1's Home Phone from the Home Inquiry page.
Ext:		Extension of the provider's home phone number; System derived; Not user editable; Defaults to Parent 1's Home Extension from the Home Inquiry page.
Work:		Work phone number of the home provider; System derived; Not user editable; Defaults to Parent 1's Work Phone from the Home Inquiry page.
Ext:		Extension of the provider's work phone number; System derived; Not user editable; Defaults to Parent 1's Work Extension from the Home Inquiry page.
Fax:		Fax number of the home provider; System derived; Not user editable; Defaults to Parent 1's Fax Number from the Home Inquiry page.
<b>Box:</b>	Emergency Contact Information	
<b>Fields:</b>	Name:	Name of the person documented as an emergency contact for the provider; up to two names can be listed; User entered text box for Designated County workers or Treatment Foster Home workers; Not required; No default value.
	Phone:	Phone number of person documented as an emergency contact for the provider; up to two phone numbers can be listed; User entered text box for Designated County workers or Treatment Foster Home workers; Not required; No default value.
	Ext.:	Phone extension of the person documented as an emergency contact of the provider; up to two extensions can be listed; User entered text box for Designated County workers Treatment Foster Home workers; Not required; No default value.
<b>Box:</b>	Further Information	
<b>Fields:</b>	Primary Language:	The primary language spoken at the home; User selected drop down box for Designated County workers or Treatment Foster Home workers; Required; Defaults to the value entered into the Language drop down box on the Home Inquiry page.
	Marital Status:	The marital status of Parent 1; User selected drop down box for Designated County workers or Treatment Foster Home workers; Not required; Defaults to the value entered into the Marital Status drop down box on the Home Inquiry page.
	County:	The County where the Provider is located. This field does not

	determine the provider's designated county and the provider's county of location and designated county may differ; User selected drop down box for Designated County workers; Required; Defaults to the value entered into the County drop down box on the Home Inquiry page.
Parent Agency:	The Parent Agency of the home provider (if applicable); System derived from the Parent Agency History page; Not user editable; Defaults to the name of the home member identified as Parent 1 during the Home Inquiry.
EFT:	Checkbox to visually cue the worker accessing the page as to whether or not the provider is using the electronics funds transfer function; When the Electronic Funds Transfer radio button is selected in the Provider group box in the Electronic Funds Transfer expando, the EFT checkbox becomes checked; System derived; Not user editable; Defaults to not checked.
1099 Form Required:	Indicates whether or not a 1099 tax form is required for the specific home provider; User selected check box for Designated County workers or Treatment Foster Home workers; Not required; Defaults to not checked
FEIN:	A radio button selected to enter Federal Employer Identification Number; User selected radio button for Designated County workers or Treatment Foster Home workers; Not required; Defaults to not selected.
SSN:	A radio button selected to enter Social Security Number; worker entered; User selected radio button for Designated County workers or Treatment Foster Home workers; Not required; Defaults to not selected.
N/A:	A radio button to indicate that no SSN or FEIN numbers are available; User selected radio button for Designated County workers or Treatment Foster Home workers; Not required; Defaults to selected.
FEIN/SSN Text Box:	A text box used to store either the FEIN or SSN for the provider; Enabled when either the FEIN or SSN radio buttons are selected; User entered text box for Designated County workers or Treatment Foster Home workers; Required when either the FEIN or SSN radio buttons are selected; No default value.
<b>Box:</b>	County Provider ID
<b>Fields:</b>	County: This field is used in combination with the County Provider ID field to store a County's provider ID. The County that appears in this field depends on the County assignment of the user viewing the page; Saves to COUNTY_PROVIDER_CROSS_REF.cd_cnty; User selected drop down box for Designated County workers or Treatment

	County	Foster Home workers; Required; Defaults to the county of the worker accessing the page.
	Provider ID:	This field is used in combination with the County field to store a County's provider ID; Saves to COUNTY_PROVIDER_CROSS_REF.id_cnty_prvd_org; User editable text box for assigned workers; Required; No default value.
<b>Box:</b>	Provider (in Electronic Funds Transfer expando)	
<b>Fields:</b>	Provider ID:	The unique ID number assigned to the specific Home Provider; System derived; Not user editable; No default value.
	Provider Name:	Name of the provider; System derived from home member identified as Parent 1; Not user editable; Defaults to home member identified as Parent 1 during the Home Inquiry.
	Payment Method:	Identifies if the provider's payments are being mailed as checks or electronically deposited; User selected when the Pre-note Status in the Pre-Note Information group box has the value of 'Pre-note Sent' for Designated County workers; Defaults to 'Check'.
<b>Box:</b>	Pre-Note Information (in Electronic Funds Transfer expando)	
<b>Fields:</b>	Pre-Note Status:	Pre-note Status: System derived; Not user editable; Defaults to 'No Request'.
	Pre-Note Requested:	Checkbox used to record if a pre-note has been requested; User selected checkbox for Designated County workers when Pre-Note Status does not equal 'Pre-Note Sent'; Not required; Defaults to unchecked.
	Date Pre-Note Sent:	Date that the Pre-Note is requested; When the Pre-Note Requested checkbox is selected and the Save button is pressed on the Home Provider page, the Date Pre-Note Sent field sets to current system date; System derived; No default value.
	Trace Number:	The number used to track the Pre-Note request; When the Pre-Note Requested checkbox is selected and the Save button is pressed on the Home Provider page, the Trace Number field sets to system generated unique number; System derived; No default value.
<b>Box:</b>	Bank Information (in Electronic Funds Transfer expando)	
<b>Fields:</b>	ABA Number:	Used to record bank's ABA number; User entered number field when Pre-Note Status value is 'Pre-Note Requested' for Designated County workers; Required when the Request Pre-Note checkbox is selected; No default value.
	Account Number:	Used to record the provider's bank account number; User entered number field when Pre-Note Status value is 'Pre-Note Requested' for Designated County workers; Required when the



	Bank Name:	Request Pre-Note checkbox is selected; No default value. The name of the bank for which the EFT is being requested; User entered text box when Pre-Note Status value is 'Pre-Note Requested' for Designated County workers; Required when the Request Pre-Note checkbox is selected; No default value.
<b>Links:</b>	Delete:	When a record is inserted in the County Provider ID group box, the record has a Delete hyperlink located to the right of the entry. When selected, the appropriate County Provider ID record is removed from the group box.
<b>Options:</b>	Parent Agency History:	Navigates the user to the Parent Agency History page. Page opens in view only mode for non-Designated County workers.
	Provider Repayment Method:	Navigates the user to the Provider Repayment Method page.
	Text documents:	Five templates are available under the Text heading in the Options drop down box: Foster Family Support Plan Eval/Revision, Foster Family Support Plan, Adoptive Family Support Plan, Family Fact Sheet, and. Foster Parent Notice – Confidentiality of Records. All templates open in view mode for non-Designated County workers, except for the Adoptive Family Support Plan and Family Fact Sheet. For these two templates, Statewide and BMCW Adoption workers may edit the information along with Designated County or Treatment Foster Home workers.
<b>Buttons:</b>	Insert:	Inserts a new record in the County Provider ID group box.
	Save:	Standard Save Processing
	Close:	Standard Close Processing

### 1.2.2.3. Background Processing

Note: Unless otherwise stated, the work listed below can only be completed by workers of the Designated County.

1. The county of the worker accessing the page (WORKER.CD\_OFC\_DIV) will always be screened to establish whether it matches the Designated County (PROVIDER.ORG.CD\_DES\_CNTY) of the Home Provider record.
2. Upon creation of the Home Provider record, the Parent 1 from the Home Inquiry Members Tab will pre-fill the Parent 1 field in the Home Information group box and the Provider Name field in the Electronic Funds Transfer expando on the Home Provider Home Tab.
3. Upon creation of the Home Provider record, the Parent 2 from the Home Inquiry Members Tab will pre-fill the Parent 2 field on the Home Provider Home Tab.
4. Upon creation of the Home Provider record, the Primary Language, Marital Status, and County fields on the Home Provider Home Tab will pre-fill from the Home Inquiry page.
5. As Parent 1 and Parent 2 roles are changed on the Members tab, the Parent 1 and Parent 2

- names in the Home Information group box on the Home tab will be updated.
6. The physical address for the Home Provider pre-fills from the address of the Home Inquiry into the Home Information group box on the Home tab.
  7. If a parent agency is changed on the Parent Agency History page, on return to the Home Provider page, the Parent Agency name will be updated in the Parent Agency field.
  8. The following radio buttons are mutually exclusive:
    - a. If SSN radio button is selected, then the worker is required to enter SSN for the home provider.
    - b. If FEIN radio button is selected, then the worker is required to enter a FEIN for the home provider.
    - c. If N/A radio button is selected, then the associated text field is blank and disabled.
  9. By selecting the Delete hyperlink in the County Provider ID group box, the user will delete an existing County Provider ID record. When selected, the user will be prompted by a notification message stating “This option will delete the selected Provider ID. Do you want to continue?” prior to the deletion.
  10. When the user selects the Pre-Note Requested checkbox in the Electronic Funds Transfer expando, the Pre-Note Status field is set to 'Prenote Requested' (code value= 'R'), and the ABA Number, Account Number, and Bank Name fields become enabled and required.
  11. When the user selects the Check radio button (after the Electronic Funds Transfer radio button was selected during a previous EFT request process), the user receives a notification stating “Changing the payment method to Check will require you to request a new pre-note before you can select EFT again. Are you sure you want to do that? Yes No”. If the user selects Yes in the message box, then the Pre-Note Status field is changed to 'No Request' (code value='N'). The Pre-Note Requested checkbox becomes unchecked and the Date Pre-Note Sent and Trace Number fields become null.
  12. When the Electronic Funds Transfer radio button is selected in the Provider group box in the Electronic Funds Transfer expando, the EFT checkbox in the Further Information group box becomes selected.
  13. If the user accessing the Electronic Funds Transfer expando does not have security access to this information, upon expanding the expando, the user will receive the message “You do not have security access to this information.” The fields within the expando will not be displayed.
  14. Only workers in the designated county (unless the worker has 'Create/Maintain Private Provider' security) and with the appropriate 'Link Providers' security group will be able to link provider records (the 'Duplicate' Type value will only be available for those with the proper security). Note: Treatment Foster Homes will be locked so that Maximus/State will be the only workers with 'Provider Link' security for these homes
  15. To link a provider, select the 'Duplicate' value from the Type dropdown list (selecting the 'Duplicate' value will auto-select and disable the 'Inactive' Status value, display the Search link, display a 'Send Reminder' checkbox in the Basic group box, display a 'Completed' checkbox in the Basic group box, display a 'Send Reminder' date field in the Basic group box, display a 'Completed' date field in the Basic group box, and will continue to display the 'Duplicate' value as enabled). The worker will then select the Search link. This link will open a new custom provider search that will only display the providers that are available to link. Note: The 'Search' link, 'Send Reminder' checkbox, the 'Completed' checkbox, the 'Send Reminder' date field, and the 'Completed' date field in the Basic group box, will

always be displayed for those with the appropriate security to allow the workers to link the provider.

The first search is a required action if the type is set to 'Duplicate'. If a worker selects the 'Save' button prior to selecting a provider the system will display the following message, 'Please access the Provider Search page by selecting the Search hyperlink to select a provider.'

16. Custom Provider Search page – Search results will only display providers that meet the following requirements:
  - i. Level one provider (Not already linked to a provider).
  - ii. Note: A Home Provider can be linked to a Private Provider and visa versa.
17. Once the worker has selected 'Duplicate' and searched a provider, then the worker has several 'Save' options:
  - i. The worker may select 'Save' without checking either checkbox. This will initiate standard save processing which will allow the worker to return to the page to complete the linking process. In place of the hidden fields display the following message, "Duplicate Provider: Please use 'Provider Last Name, Provider First Name (no suffix/prefix/MI)' (Provider ID #####)"
  - ii. The worker may select the 'Send Reminder' checkbox which will dynamically add a date to the associated Reminder Date field on the Home Provider page, and upon save will set a 'Provider Link' tickler for the worker and send an automated message notifying the worker of the changes.
  - iii. The worker may select the 'Completed' checkbox when they are ready to complete the changes. Selecting 'Save' after checking the 'Completed' checkbox will insert the system date in the 'Completed' checkbox, hide the License Type field and the License Agency field (continue to display the HSRS field). Also, selecting 'Save' triggers the system to end/not approve OHP/In-Home placements and licenses.
18. Once inactive duplicate providers are linked, those with 'Provider Link' security will be able to change which provider the duplicate provider is linked to. The 'Search' hyperlink will continue to be available to those with the appropriate security.
19. When setting a provider record as an Inactive Duplicate provider that already has records linked to it, all associated records will also change to point to the new 'retained provider record'. For an example, Provider C is linked to Provider B and the worker decides that Provider B is a duplicate provider of Provider A. When the worker sets Provider B as an inactive duplicate and links the record to Provider A, Provider C will now also dynamically be pointed to Provider A. So, when completing a provider search for either Provider B or Provider C, the records will indicate that the records are duplicates and will instruct the worker to use Provider A.

#### 1.2.2.4. Save Processing

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if they would like to 'Save changes before closing the page.'
2. The Primary Language and County fields are required and cannot have a null value at time of save processing. If either of these fields are null, the user will receive an error validation stating "Please enter data in the fields which are highlighted - <field name>."
3. If two County Provider ID records are entered in the County Provider ID group box for the same county, the user will receive a save validation stating "A duplicate county was entered for county: <county name>."
4. If numbers and/or special characters are entered into the Name field in the Emergency Contact Information group box, the user will receive a save validation at time of save processing stating "Emergency Contact Name can only contain letters, hyphens, and apostrophes."
5. When there is no Parent 2 identified on the Members tab and the Marital Status filed is Married Couple, Unmarried Couple, or Legally Separated, the following validation message is displayed, "One member of the family must be designated with a role of Parent 2 when the Provider's Marital Status is Married Couple, Unmarried Couple, or Legally Separated."
6. When there is a Parent 2 identified on the Members tab, and the Marital Status is Single Female or Single Male, the following validation message is displayed, "No family members may be designated with a role of Parent 2 when the Provider's Marital Status is Single Female or Single Male."
7. Upon selecting the Save button (without selecting either the 'Send Reminder' checkbox or the 'Completed' checkbox), execute the save processing as follows:
  - a. Initiate standard save processing.
  - b. Hide the License Type field and the License Agency field (continue to display the HSRS field).
8. In place of the hidden fields display the following message, "Duplicate Provider: Please use 'Provider Last Name, Provider First Name (no suffix/prefix/MI)' (Provider ID #####)"
9. Upon selecting the Save button (when selecting the 'Send Reminder' checkbox), execute the save processing as follows:
  - a. Set the Reminder Date field to the system date.
  - b. The system sends the '14-day Reminder' automated message notifying the worker that the placements will be closed.
  - c. The 'Provider Link' tickler is set for the worker completing the linking process.
    - i. Name of tickler: Inactivate Duplicate Provider
    - ii. Category = OHCUC
    - iii. Type = Duplicate
    - iv. Display it for the duplicate provider using dup provider name and ID and count down immediately- Due in 14 days down to 0 days with no escalation.
    - v. Created: When the checkbox is checked to send 14 day notification
10. Deleted: When the checkbox for Completed is checked.
  - Upon selecting the Save button (when selecting the 'Completed' checkbox), execute the save processing as follows:

- Set the Completed Date field to the system date.
- If the selected retained provider is an inactive provider, the system will auto-set the status to 'Active' upon 'Save'.
- Set the Bed Capacity field to '0'.
- Set the Provider record to show that no children are in placement.
- The active licensed and unlicensed service types should be set to "Inactive".
- If approved open OHP/In-Home Services exist, end the placements as follows:
- Set the end reason to 'Duplicate Provider Clean-up'. Note: The Override checkbox on the Service Ending page should not be enabled for the 'Duplicate Provider Clean-up' end reason.
  - Set the Ending Purpose to Administrative Change within Placement episode.
  - The 'Is the End of This Child's Placement a Discharge from All Placements?' question should default to 'No'
  - The Discharge Reason field should default to 'Null'.
  - The End date should be set to the last day of the previous month due to overpayment concerns. \*Until the December release, workers will continue to manually close placements.
  - If the day inactivating is the last day of the month, then use that day, otherwise use the previous month.
  - Auto-approve the page with the name of the worker inactivating the provider with the system date.
- If the placement begin date is > the last day of the previous month, then the system will end the placement with the End Reason of 'Placement Made in Error'.

Example

Placement Begin date: 10/10/05

Provider Inactivation date: 10/17/05

Set the Inactivation date to 10/10/05 with the approval date

= sys\_date

- If pending OHP/In-Home Services exist:
  - 'Not approve' the pending work with the name of the person inactivating the provider record for reason of duplicate.
  - Set the approval date with the system date.
- If a pending Service Ending exists for an OHP/In-Home Services:
  - Approve the Service Ending with the name of the person inactivating the provider record for reason of duplicate ('not approve' is not a valid option for Service Ending)
  - Set the Service Ending approval name to the name of the worker 'inactivating' the provider.
  - Set the approval date to the system date.
  - Set the End Date to be = last day of the previous month

- Set the End Reason to be 'Duplicate Provider Clean-up'. Note: The Override checkbox on the Service Ending page should not be enabled for the 'Duplicate Provider Clean-up' end reason.
- If an approved active license exists, end the license on the Additional Licensing Actions page as follows:
  - Set the Actions field to 'Close'.
  - Set the Effective Date to be the system date.
  - Set the Reason 1 field to be 'Duplicate Provider Clean-up'. \*Until the December release, workers will continue to manually close licenses.
  - Auto-approve the page with the name of the worker 'inactivating' the provider and use the system date.
  - The system sends a 'License Status Change' automated message notifying the worker that the license was 'ended'. The system sends a 'License Status Change' automated message notifying the worker that the license was 'ended'.
- If a pending license exists, 'not approve' the license on the License – Approval History page as follows:
  - Set the name to the name of the worker 'inactivating' the provider.
  - Set the date to the system date.
  - The system sends a 'License Status Change' automated message notifying the worker that the license was 'not approved'.
- If an approved open Foster Care Rate Setting exists (and a FCRS Ending has not been initiated), end the FCRS as follows:
  - Approve the ending work with the name of the person inactivating the provider record for reason of duplicate.
  - Set the not approve date with the system date.
- If a pending FCRS exists
  - 'Not approve' the pending work with the name of the person inactivating the provider record for reason of duplicate.
  - Set the approval date with the system date.
  - Set the FCRS Ending to be dt\_end = dt\_efctv
- If an approved FCRS exists with a pending FCRS Ending:
  - Approve the FCRS Ending with the name of the person inactivating the provider record for reason of duplicate ('not approve' is not a valid option for FCRS Ending)
  - Set the approval date to the system date.
  - Set the End Date to the last day of the previous month (or end date of the placement is after the last day of the previous month).
  - Set the End Reason to be 'Duplicate Provider Clean-up'

#### Example

Deactivated on 10/17/05

FCRS effective date 9/10/05

Set the Inactivation Date to 9/30/05

- **Unless** the inactivation date < the FCRS effective date. If the last day of the previous month < FCRS dt\_efctv then end FCRS for reason 'Made in Error' and FCRS dt\_end equal to dt\_efctv

Example

Deactivated on 10/17/05

FCRS effective date 10/05/05

Set the Inactivation Date to 9/30/05

- If an approved FCRS exists with an approved FCRS Ending:
  - Change the approval name on the FCRS Ending with the name of the person inactivating the provider record for reason of duplicate
  - Set the FCRS Ending approval date to the system date.
  - Set the End Date to the last day of the previous month (or end date of the placement is after the last day of the previous month).
  - Set the End Reason to be 'Duplicate Provider Clean-up'
  - Set the end reason to 'Duplicate Provider Clean-up'. The Inactivation date should be set to the last day of the previous month (or end date of the placement if the end date is.

Example

Deactivated on 10/17/05

FCRS effective date 9/10/05

Set the Inactivation Date to 9/30/05

- **Unless** the inactivation date < the FCRS effective date. If the last day of the previous month < FCRS dt\_efctv then end FCRS for reason 'Made in Error' and FCRS dt\_end equal to dt\_efctv

Example

Deactivated on 10/17/05

FCRS effective date 10/05/05

Set the Inactivation Date to 9/30/05

- Placement related ticklers will be deleted when the Placement is ended with the reason of Duplicate Provider Cleanup similar to the functionality for Placement ending for the reason of Made in Error.
- With the Foster Care functionality changes introduced with the December release workers can proactively Create a Rate Setting 30 days in advance of the current date. If such a futuristic rate setting exists in the system, and the associated placement is closed for the reason of Duplicate Provider Cleanup, the rate setting is closed as made in error with the begin and end dates set to the same date and appropriate approval rows indicating the name and date of the person performing the duplicate provider cleanup are inserted.

**1.2.2.5.      CRUD Matrix**

<b>Table Name</b>	<b>CRUD</b>
PROVIDER_ORG	RU
PROVIDER_PART	R
ADDRESS	R
COUNTY_PROVIDER_CROSS_REF	CRUD
WORKER	R



### 1.2.3. Tab 2 – Members

**Basic**

Number: 20190    Name: Sally Safety    Type: Foster Home    Status: Active

Lcns. Type: Licensed by State of VM    Lcns. Agency: Unknown    HSRS Number: 2204020190

Home    **Members**    Characteristics    Services    Training

**Home Members**

Name	Status	Gender	DOB	Role	
<a href="#">Sally Safety</a>	Active	Female	08/15/1969	Parent 1	<a href="#">Deactivate</a> <a href="#">Remove</a>
<a href="#">Rex Fernald</a>	Inactive	Male	07/15/1995	Parent 2	<a href="#">Reactivate</a> <a href="#">Remove</a>
<a href="#">Amy Fernald</a>	Active	Female	03/22/1998	Daughter	<a href="#">Deactivate</a> <a href="#">Delete</a>

[Insert](#)

**Children in Placement**

Name	Gender	DOB	Role
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**Payee Information**

Payee Name(s): Sally Safety

[Save](#) [Close](#)

#### 1.2.3.1. Tab Overview

This tab displays information about individuals residing at the physical location of the home, including all household members, such as parents, birth children, relatives, non-relatives, and children currently under placement in that home. The page allows Designated County workers or Treatment Foster Home workers to change the role of the person in the home. These workers can add new home members via the Insert button, which opens the data retrieval Person Search page. Home member statuses can also be maintained through the Deactivate, Reactivate, Remove, and Delete hyperlinks located to the right of the home member participant records. For example, if an uncle recently moved into the household, the Designated County worker would press the Insert button to launch the Person Search page. The worker would conduct a search to check if the uncle is in the eWiSACWIS database. If the uncle's Person Management record is found, the worker would select the radio button to the left of the uncle's record on the Person Search page and press the Continue button. Upon navigation back to the Members tab, the uncle's record would be added to the Home Members group box.

If the uncle is not found during the Person Search, the Designated County worker is able to create a person record for the uncle by selecting the Create button on the Person Search page. This action navigates the worker to a new Person Management record. After saving the Person Management record for the uncle and returning to the Person Search page, pressing the Continue button will allow the worker to proceed with the process of adding the uncle as a new home member.

The Designated County worker **or Treatment Foster Home** worker can also deactivate, reactivate, delete (only prior to initial save processing for the new home member) or remove a person from the Members tab through the respective hyperlinks to the right of each home member record.

A scroll bar appears when there are four or more members in the family. This allows workers to view all members of the family, by scrolling up or down. There must always be a Parent 1 role selected, as system processing occurs based on information related to Parent 1, such as the Payee Name.

This tab also displays information about children who are currently in placement with the home in the Children in Placement group box. This is system derived from the placement information and contains gender, DOB, Role and child's name as documented in eWiSACWIS. A scroll bar appears when there are three or more children in placement. This allows all workers to view all children in placement, by scrolling up or down.

The Payee Name(s) field will be displayed on the Provider's check as it appears on the Members tab (for example 'Joan and Roger Smith').

When accessed by a non-Designated County worker **or non-Treatment Foster Home worker**, all fields on the Members tab will be disabled (grayed-out). The Insert button in the Home Members group box as well as the Deactivate, Reactivate, and Remove hyperlinks will be disabled. The non-Designated County worker or **non-Treatment Foster Home** worker will have the ability to select the home member name hyperlink to navigate to the Person Management record. The Person Management page will open in view mode.

#### **1.2.3.2. Tab Information**

**Box:** Home Members

<b>Fields:</b>	Name:	Full name of the home member; hyperlink to the home member's Person Management page; System derived concatenation of the person's first and last name in the PERSON table; Not user editable; No default value.
	Status:	Status of the home member (Active, Inactive, Removed); System derived; Not user editable; Defaults to 'Active' when a new home member is added to the Members tab.
	Gender:	Gender of the home member (Male, Female); System derived from the person's gender in the PERSON table; Not user editable; No default value.

	DOB:	Date of birth of the home member; System derived from the person's DOB in the PERSON table; Not user editable; No default value.
	Role:	The role of the household member; User selected drop down box for Designated County workers or Treatment Foster Home workers; Required; No default value.
<b>Box:</b>	Children in Placement	
<b>Fields:</b>	Name:	Full name of the child placed in home; System derived concatenation of the child's first and last name in the PERSON table where EPISODE.id_prsn = PERSON.id_prsn; Not user editable; No default value.
	Gender:	Gender of the child placed in home (male, female); System derived from the child's gender in the PERSON table where EPISODE.id_prsn = PERSON.id_prsn; Not user editable; No default value.
	DOB:	Date of birth of the child placed in the home; System derived from the child's DOB in the PERSON table where EPISODE.id_prsn = PERSON.id_prsn; Not user editable; No default value.
	Role:	The role of the child in placement defaults to Out of Home Placement; System derived; Not user editable; Defaults to 'Out of Home Placement'.
<b>Box:</b>	Payee Information	
<b>Fields:</b>	Payee	
	Name(s):	The payee name(s) that will be displayed on checks sent to the home provider; User entered text box for Designated County workers Treatment Foster Home workers; Required; Defaults to person selected as Parent 1 from the Home Inquiry page.
<b>Links:</b>	Name:	Located in the Home Members group box. The name of each home member is a hyperlink to the member's Person Management record. The Person Management record will open in view mode for non-Designated County workers or non-Treatment Foster Home workers.
	Deactivate:	Located in the Home Members group box. Accesses the Member Status page and fills in the value 'Deactivate' in the Action Requested field on the Member Status page. Not available for non-Designated County workers or non-Treatment Foster Home workers.
	Reactivate:	Located in the Home Members group box. Accesses the Member Status page and fills in the value 'Reactivate' in the Action Requested field on the Member Status page. Not available for non-Designated County workers or non-Treatment Foster Home workers.
	Remove:	Located in the Home Members group box. Accesses the Member Status page and fills in the value 'Remove' in the Action Requested field on the Member Status page. Not available for non-Designated County worker or non-Treatment Foster Home workers .
	Delete:	Located in the Home Members group box. Allows the Designated County worker to delete a home member from the Home Members group box prior to initial save processing. Not available for non-Designated County workers or non-Treatment Foster Home workers.
<b>Buttons:</b>	Insert:	Accesses Person Search (disabled for non-designated county workers or

non-Treatment Foster Home workers).

Save: Standard Save Processing  
Close: Standard Close Processing

### **1.2.3.3. Background Processing**

Note: Unless otherwise stated, the work listed below can only be completed by workers of the Designated County or by a Treatment Foster Home worker if the Provider is a Treatment Foster Home.

1. The county of the worker accessing the page (WORKER.CD\_OFC\_DIV) will always be screened to establish whether it matches the Designated County (PROVIDER.ORG.CD\_DES\_CNTY) of the Home Provider record.
2. To deactivate, reactivate, remove, or delete a participant, the worker will select the appropriate hyperlink to the right of the home member's record in the Home Members group box.
3. The Reactivate hyperlink is enabled when a home member's status is equal to Inactive or Removed.
4. The Deactivate hyperlink is enabled when a home member's status is equal to Active.
5. The Remove hyperlink is enabled when a home member's status is equal to Active or Inactive.
6. When selecting the Remove hyperlink, the worker is prompted with a notification message stating "Are you sure you want to permanently remove this home member?" If the worker selects 'Yes', the Member Status page opens.
7. The Delete hyperlink is enabled when a home member is newly added to the Home Member group box and initial save processing has not been triggered. When the Delete hyperlink is selected, the worker receives a notification message stating "Are you sure you want to delete currently selected information?" If the worker selects 'Yes', the home member record is will removed from the Home Members group box and the worker is returned to the Members tab.
8. If the Parent 1 role is assigned to another member, then the Name field in the header will display the new Parent 1 name.
9. If the Insert button is selected, the Person Search page is displayed and worker can search the system for an existing record for the new home member. If a match is found, then the worker can select Continue and the person's information will fill the Name, DOB, and Gender fields. The Status field is set to Active. If no match is found on the Person Search page, then the Create button is used to access the Person Management page, where worker enters any available information on the home member and selects Save and Close. This takes the worker back to the Person Search page, selecting Continue takes the worker back to the Home Provider page.
10. A scroll bar appears on the right side of the Home Members group box to facilitate viewing all home members (scroll bar appears when there are four or more home members).
11. A scroll bar appears on the right side of the Children in Placement group box to facilitate viewing all children in placement (scroll bar appears when there are four or more children in placement).
12. The Payee Name(s) field will default to Parent 1 name (For example, 'Bob Smith') from the Home Inquiry page. Workers can edit the payee (For example, Karen and Jerome Humphry).

**1.2.3.4. Save Processing**

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if they would like to 'Save changes before closing the page.'
2. After a new role of Parent 1 is selected for a household member on the Members tab and worker selects the Save button, the following notification message appears: "You have selected a new Parent 1, verify the current home address information."
3. If changes are made to the members' roles on the Members tab and no member is selected as Parent 1, when the worker presses the Save button, the following message appears: "At least one member must be designated with a role of Parent 1."
4. If changes are made to the members' roles on the Members tab and there is more than one home member with the role of Parent 2, when the worker presses the Save button, the following message appears: "There cannot be more than one member of the family designated with a role of Parent 2."
5. If changes are made to the members' roles on the Members tab and there is more than one home member with the role of Parent 1, when the worker presses the Save button, the following message appears: "More than one member of the family has been identified as the Parent 1 in the household."
6. If changes are made to the members' roles on the Members tab and the home member designated as Parent 1 has a status of 'Inactive', when the worker presses the Save button, the following message appears: "You may not select an Inactive member as Parent 1."

**1.2.3.5. CRUD Matrix**

<b>Table Name</b>	<b>CRUD</b>
PROVIDER_ORG	RU
PROVIDER_PART	CRU
PROVIDER_PART_STAT	R
PERSON	CRU
EPISODE	R

### 1.2.4. Tab 3 - Characteristics

#### 1.2.4.1. Tab Overview

The Characteristics Tab allows the worker to record helpful information that assists the worker when making placement decisions for a child. The Characteristics Tab includes what the Family Accepts and what Other Family Characteristics the providers have.

The Characteristics tab will display in view-mode when accessed by non-Designated County workers or non-Treatment Foster Home workers.

- Family Accepts group box displays information about the characteristics of children that the family is willing to accept for potential placement in the home. This includes preferences, restrictions, and assessments, and can be identified as searchable criteria at the time of completing a provider service search; and
- Other Family Characteristics group box lists those characteristics of the home that may affect a decision to place a child there; this information may not be identified as searchable criteria at the time of completing a provider service search.

By defining these selection lists, the Department can meet specific needs, such as the need to designate homes that will accept children with eating disorders. The worker has the ability to search up to two of the “family accepts” characteristics when looking to place a child. This

provides the ability to search for special needs placements and facilitate this type of placement.

Designated County workers and Treatment Foster Home workers can add or change the selections made for the home when they become aware of changes in its characteristics. They do so by highlighting the appropriate values in the Possible Values list boxes (holding down the Control key will allow the worker to multi-select values), and selecting the Add x > buttons. This action will move all highlighted values to the Selected Values list boxes on the right side of the Characteristics tab. If the user would like to add all possible values, the Add All Values >> buttons will move every value to the Selected Values list boxes at one time.

To remove already selected values from the Selected Values list box, the user can highlight the items in the Selected Values box and press the < Remove button. The highlighted values will no longer appear in the Selected Values list boxes. As with adding all values, a worker can remove all values from the Selected Values list boxes by pressing the << Remove All button. The Selected Values list boxes would contain no information after select this button.

#### 1.2.4.2. Tab Information

**Box:** Family Accepts

**Fields:** Possible Values The user selected list box displays client characteristics that a provider might possibly accept. When conducting a Provider Service Search in an attempt to place a child with a provider, the worker may use additional search criteria including up to two Family Accepts Characteristics.

The worker can select or de-select client characteristics by clicking on them. The worker can select none, many, or all. By holding down the Control key, the worker is able to multi-select specific characteristics. Characteristics listed consecutively can be multi-selected by holding down the Shift key, clicking on the first characteristic and then clicking on the final characteristic in the list. All characteristics between the first and final selection will be highlighted.

Selected Values: Stores the selected list of values that a provider is willing to accept; User selected list box; Not required; No default value.

**Box:** Other Family Characteristics

**Fields:** Possible Values The user selected list box displays characteristics about the provider. These characteristics are not searchable during a Provider Service Search, but instead provide more insight into the strengths/competencies of the home provider.

The worker can select or de-select characteristics by clicking on them. The worker can select none, many, or all. By holding down the Control key, the worker is able to multi-select specific characteristics. Characteristics listed consecutively can be multi-selected by holding down the Shift key, clicking on the first characteristic and then clicking on the final characteristic in the list. All characteristics between the first and final selection

		will be highlighted.
	Selected Values:	Stores the selected list of values pertaining to a provider; User selected list box; Not required; No default value.
<b>Buttons:</b>	Add x:	Moves values highlighted in the Possible Values list box to the Selected Values list box. Disabled for non-Designated County workers. Disabled for non-TFH workers, when provider is a Treatment Foster Home.
	Add All Values:	Moves all values in the Possible Values list box to the Selected Values list box. Disabled for non-Designated County workers. Disabled for non-TFH workers, when provider is a Treatment Foster Home.
	Remove:	Moves values highlighted in the Selected Values list box to the Possible Values list box. Disabled for non-Designated County workers. Disabled for non-TFH workers, when provider is a Treatment Foster Home.
	Remove All:	Moves all values in the Selected Values list box to the Possible Values list box. Disabled for non-Designated County workers.
	Save:	Standard Save Processing
	Close:	Standard Close Processing

#### 1.2.4.3. Background Processing

Note: Unless otherwise stated, the work listed below can only be completed by workers of the Designated County or by a Treatment Foster Home worker if the Provider is a Treatment Foster Home.

1. The county of the worker accessing the page (WORKER.CD\_OFC\_DIV) will always be screened to establish whether it matches the Designated County (PROVIDER.ORG.CD\_DES\_CNTY) of the Home Provider record **when the provider type is any value other than Treatment Foster Home.**
2. The values in the Possible Values list boxes are read from the CODE\_DESC table.
3. The Designated County or **Treatment Foster Home worker** will select or deselect characteristics by clicking on them. Clicking on them once will select them, clicking on them again will de-select them. Workers can select multiple characteristics pressing the Ctrl key while clicking on desired characteristics. Characteristics listed consecutively can be multi-selected by holding down the Shift key, clicking on the first characteristic and then clicking on the final characteristic in the list. All characteristics between the first and final selection will be highlighted.
4. If an item in the Possible Values list box has already been added to the Selected Values list box and the user attempts to add the same value again, the user will receive a notification message stating "<Possible Value> has already been selected."

#### 1.2.4.4. Save Processing

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if they would like to 'Save changes before closing the page.'



2. Upon save processing, the values in the Selected Values list boxes are saved to the PROVIDER\_CHAR table. If the values are from the Family Accepts group box, they will save to the PROVIDER\_CHAR table and set fl\_srch = 'Y'. If the values are from the Other Family Characteristics group box, they will save to the PROVIDER\_CHAR table and set fl\_srch = 'N'.

#### **1.2.4.5.      CRUD Matrix**

<b>Table Name</b>	<b>CRUD</b>
PROVIDER_ORG	R
PROVIDER_CHAR	CRD

1.2.5. Tab 4 - Services

Home Provider - Microsoft Internet Explorer provided by DHFS

**eWiSACWIS** Print Spell Check Help

**Basic**

Number: 20190 Name: Sally Safety Type: Foster Home Status: Active

Lcns. Type: Licensed by State of WI Lcns. Agency: Unknown HSRS Number: 2204020190

Home Members Characteristics **Services** Training

**Provider Capacity**  
Total Bed Capacity: 15

**Clients By Gender**

	Male	Female	Total
Preferences:	10	10	10
Placements:	1	0	1
Reservations:	0	0	0

**Clients By Age**

Under 2

Members: 0

Placements: 0

Reservations: 0

Preferred Age: From: 0 To: 18

**Service Details**

	Male	Female	Total
Capacity:	2	2	2
Placements:	0	0	0
Reservations:	0	0	0
Vacancies:	1	2	2

**Service Specifics**

☐ All Counties ☒ Milwaukee [Edit Unlicensed Services](#)

**Unlicensed Services**

Category	Type	Status
<input checked="" type="radio"/> AODA inpatient	AODA inpatient detox-drug	Active
<input type="radio"/> Athletics	Athletic equipment	Active

Options:

Done Local intranet

**Basic**

Number: 20190    Name: Sally Safety    Type: Foster Home    Status: Active

Lcns. Type: Licensed by State of WI    Lcns. Agency: Unknown    HSRS Number: 2204020190

**Home**    **Members**    **Characteristics**    **Services**    **Training**

Reservations: [ ] [ ] [ ]

**Service Specifics**

☒ All Counties    ☐ Milwaukee

**Unlicensed Services**

County	Category	Type	Status
<input checked="" type="radio"/> Milwaukee	AODA inpatient	AODA inpatient detox-drug	Active
<input type="radio"/> Milwaukee	Athletics	Athletic equipment	Active

**Licensed Services**

County	Category	Type	Status
<input type="radio"/> Milwaukee	Fstr Hm General	F.H. - Gen. License 0-4	Active
<input type="radio"/> Milwaukee	Fstr Hm General	F.H. - Gen. License 12-14	Active
<input type="radio"/> Milwaukee	Fstr Hm General	F.H. - Gen. License 15+	Active

Options: [ ]    **Go**    **Save**    **Close**

Done    Local intranet

### 1.2.5.1. Tab Overview

This tab maintains current information about the specific services offered by a home provider. It has the following major features:

- Allows the worker to associate multiple unlicensed services to a given family, which can be viewed in the Service Specifics group box (licensed services are assigned to a family via the Home Provider License page);
- Displays the County of the worker accessing the record in the county specific drop down box in the Service Specifics group box;
- Displays the capacity, number of placements, number of reservations and current vacancies with the home for each out of home service type (in home service capacities are not maintained in eWiSACWIS); and
- Displays the active unlicensed and licensed services in the Service Specifics group box. Services with a status of Inactive will not be displayed on this tab.

The Service Specifics group box shows active services for the Home Provider in two formats:

- By selecting the county specific radio button, the worker will only see unlicensed and licensed services for the selected county. The County column is not visible in the Service Specifics group box. In this view, the Edit Unlicensed Services hyperlink is available and located to the right of the county specific radio button. When selecting this link, the Edit

Unlicensed Services page opens and allows the worker to add/update unlicensed services. This page is discussed in greater detail in the Edit Unlicensed Services section of this paper.

- When selecting the All Counties radio button, services associated with the provider from every county are displayed in the Service Specifics group box. The County column heading is visible for unlicensed and licensed services.

Licensed services can be viewed from the Home Provider Services tab for all counties. However, the statuses and capacities for these services cannot be updated by the worker on this tab. These updates are conducted on the Home Provider License and are discussed in the *PM04a: Home Provider Licensing* topic paper. Only the Designated county worker or Treatment Foster Home worker (when provider is a Treatment Foster Home) will be able to update licensed service information. Consequently, if a worker from a non-Designated county wants licensed services added/maintained, an offline process must occur between the Designated and non-Designated county workers. The Designated worker would then make the needed service changes on the license. A similar process must occur when a non-Treatment Foster Home worker wants services added to a Treatment Foster Home by the Treatment Foster Home worker.

For each paid service type on the Home Provider Services tab, there is an associated rate. The rate may be defined as service specific or provider specific, and are recorded on the Service Rate or Provider Service Rate pages, respectively. Selecting the radio button located to the left of a service record and then selecting either the Service Rate or Provider Service Rate value in the Options drop down box accesses these pages.

If the service requires a service specific rate, the Service Rate value will be available in the Options drop down box. The Service Rate page will open in view only mode, as updates are made through the Maintain Service Type and Rate page. The Service Rate page is described in greater detail in the *PM01: Maintain Services* topic paper.

If the selected service type requires a provider specific rate, the Provider Service Rate value will be available for selection in the Options drop down box. This page can be edited from the Services tab for both unlicensed and licensed service types. The Provider Service Rate page is documented in the *PM02b: Private Provider* topic paper.

To check on existing bed reservations, the worker can select the Bed Reservation value in the Options drop down box after selecting the appropriate radio button to the left of a service type in the Service Specifics group box.

The Services tab functions differ considerably when accessed by non-Designated workers versus Designated County workers. These differences are discussed in detail in the Background Processing Section 1.2.5.3.

#### **1.2.5.2. Tab Information**

**Box:** Provider Capacity

<b>Fields:</b>	Total Bed Capacity	
	Capacity:	The total bed capacity of the provider expressed in numerical terms; User entered numeric field for Designated County worker or Treatment Foster Home worker (when provider is a Treatment Foster Home); Required; Defaults to '0' at time of supervisory screening in of the Home Inquiry record.
<b>Box:</b>	Clients by Gender	
<b>Fields:</b>	Preferences:	Provider preferences for the number of children by gender; Documented for male, female and total; User entered numeric fields for Designated County worker or Treatment Foster Home worker (when provider is a Treatment Foster Home); Required; Defaults to '0' at time of supervisory screening in of the Home Inquiry record.
	Placements:	The number of children currently placed with the provider; Documented for male, female, and total; System derived numeric fields; Defaults to '0' at time of supervisory screening in of the Home Inquiry record.
	Reservations:	The number of slots currently being reserved for children with the provider; Documented for male, female and total; System derived numeric fields; Defaults to '0' at time of supervisory screening in of the Home Inquiry record.
<b>Box:</b>	Clients by Age	
<b>Fields:</b>	Members:	The number of household members currently in the household who are under the age of 2 years old; System derived numeric field; Defaults to '0' at time of supervisory screening in of the Home Inquiry record.
	Placements:	The number of placements currently in the household for children who are under the age of 2 years old; System derived numeric field; Defaults to '0' at time of supervisory screening in of the Home Inquiry record.
	Reservations:	The number of bed reservations currently being held for slots in the household for children who are under the age of 2 years old; System derived numeric field; Defaults to '0' at time of supervisory screening in of the Home Inquiry record.
	Preferred Age:	The providers preferred age range for potential placements; Documented as a From and To range; User entered numeric fields for Designated County worker or Treatment Foster Home worker (when provider is a Treatment Foster Home); Required; Defaults to '0' and '18' for the From and To fields, respectively, at time of supervisory screening in of the Home Inquiry record.
<b>Box:</b>	Service Specifics	
<b>Fields:</b>	All Counties:	This radio button displays service types in the Service Specifics group box for all counties; When selected, the Counties header column is added to the service type view; User selected radio button; Defaults to not selected.
	County specific:	This radio button displays service types in the Service Specifics

group box for the county selected in the drop down box; When selected, the Counties header column is removed from the service type view; User selected radio button and drop down box for Designated County workers or Treatment Foster Home worker (when provider is a Treatment Foster Home); For non-Designated workers or non-Treatment Foster Home workers, the drop down box fills with their county name and is disabled; Radio button defaults to selected and the county drop down box defaults to the county of the worker accessing the provider record.

**Box:** Unlicensed Services and Licensed Services

<b>Fields:</b>	County:	The county of a service that a provider is offering; Visible when the All Counties radio button is selected; Not user editable; System generated from services activated on the Edit Unlicensed Services and Edit Licensed Services pages; No default value.
	Category:	The category of service (unlicensed in the Unlicensed Services group box and licensed in the Licensed Services group box), which the provider is offering, specific to the county selected in the county specific drop down box if the county specific radio button is selected. Not user editable; System generated from services activated on the Edit Unlicensed Services and Edit Licensed Services pages; No default value.
	Type:	The type of service (unlicensed in the Unlicensed Services group box and licensed in the Licensed Services group box), which the provider is offering, specific to the county selected in the county specific drop down box if the county specific radio button is selected. Not user editable; System generated from services activated on the Edit Unlicensed Services and Edit Licensed Services pages; No default value.
	Status:	The status of the service (unlicensed in the Unlicensed Services group box and licensed in the Licensed Services group box) that the provider is offering. Not user editable; System generated from services activated on the Edit Unlicensed Services and Edit Licensed Services pages; No default value.
	Service Details	
<b>Box: Fields:</b>	Capacity:	The male, female, and total bed capacity available for the selected service record; Not user editable; System generated from services activated on the Edit Unlicensed Services and Edit Licensed Services pages; No default value.
	Placements:	The male, female, and total number of placements currently associated to the selected service record; Not user editable; System derived from PROVIDER_SERVICE table; Defaults to '0'.
	Reservations:	The male, female, and total number of beds placed on hold currently associated to the selected service record; Not user editable; System derived from PROVIDER_SERVICE table;

	Vacancies:	Defaults to '0'. The male, female, and total number of vacancies currently associated to the selected service record; Not user editable; System derived from PROVIDER_SERVICE table; No default value.
<b>Links:</b>	Edit Unlicensed Services	Located in the Service Specifics group box. Navigates the worker to the Edit Unlicensed Services page for the county selected in the county specific drop down box. Link is not available when the All Counties radio button is selected.
<b>Options:</b>	Bed Reservation	Accesses the Bed Reservation page for the selected service record in the Service Specifics group box. The page will open in view mode for non-Designated County workers or non-TFH workers.
	Provider Service Rate	Accesses the Provider Service Rate page for the selected service record in the Service Specifics group box. This option will only be available for the selected service type where SERVICE_TYPE.fl_prvd_rate = 'Y' and SERVICE_TYPE.fl_pmnt_allwd = 'Y'. Opens in view mode when accessed from the navigational Provider Search page (i.e. Utilities search).
	Service Rate	Accesses the Service Rate page in view only mode for the selected service record in the Service Specifics group box. This option will only be available for the selected service type where SERVICE_TYPE.fl_prvd_rate = 'N' and SERVICE_TYPE.fl_pmnt_allwd = 'Y'.
<b>Buttons:</b>	Save:	Standard Save Processing
	Close:	Standard Close Processing

### 1.2.5.3. Background Processing

Note: Unless otherwise stated, the work listed below can only be completed by workers of the Designated County or by a Treatment Foster Home worker if the Provider is a Treatment Foster Home.

1. The county of the worker accessing the page (WORKER.CD\_OFC\_DIV) will always be screened to establish whether it matches the Designated County (PROVIDER.ORG.CD\_DES\_CNTY) of the Home Provider record **when the provider type is any value other than Treatment Foster Home.**
2. The county specific drop down box defaults with the county of the worker accessing the provider record. The field remains enabled for Designated County workers and Treatment Foster Home workers when the provider is a Treatment Foster Home. To add unlicensed services, the worker can select the appropriate county in the county specific drop down box and press the Edit Unlicensed Services hyperlink. The Edit Unlicensed Services page opens for the selected county. For a non-Designated County worker or **non-Treatment Foster Home worker, the** worker will only be able to launch the Edit Unlicensed Services page for the worker's county.

3. When the county specific radio button is selected in the Service Specifics group box, only the unlicensed and licensed services for the selected county will be visible in the Service Specifics group box.
4. When the All Counties radio button is selected, unlicensed and licensed services associated to the provider for all counties will be visible in the Service Specifics group box. The County column header is added to the Unlicensed and Licensed Services group boxes. Service records are displayed in alphabetical order based on the county value.
5. Scroll bars in the Unlicensed and Licensed Services group boxes allow all records to be viewed.
6. When the county specific radio button is selected in the Service Specifics group box, the Edit Unlicensed Services link is available for selection for workers assigned to the provider record.
7. When the All Counties radio button is selected, the Edit Unlicensed Services link is not available. Additionally, the county specific drop down box becomes disabled for a Designated County worker.
8. The Total Bed Capacity field in the Provider Capacity group box defaults to '0' and is enabled for workers of the Designated County or for Treatment Foster Home workers. The field is disabled for non-Designated County workers and non-Treatment Foster Home workers (when provider type is Treatment Foster Home).
9. The Service Details group box shows the details for the selected row in the Service Specifics group box. To select a row, the worker presses the radio button to the left of the appropriate record in the Service Specifics group box. The corresponding information is visible in the Service Details group box. The fields in the Service Details group box are disabled. To update capacity information for an unlicensed service, the worker must navigate to the Edit Unlicensed Services page, accessed from the Services tab. Capacity information for licensed services cannot be updated through the Home Provider Services tab or associated pages. These updates occur on the Home Provider License and are discussed in detail in *PM04a: Home Provider Licensing*.
10. Only unlicensed services with a status of 'Active' will appear in the Unlicensed Services group box.
11. Licensed services will appear in the Licensed Services group box when there is a currently active license for the provider (LICENSE.cd\_lcms\_stat = 2). Licensed services where PROVIDER\_SERVICE.qt\_male\_cap = 1 will be visible in the Licensed Services group box for the Designated County. Licensed services where capacity is greater than zero will be visible in the Licensed Services group box for the non-Designated County.
12. In-Home services (SERVICE\_TYPE.fl\_in\_home = 'Y') offered by the provider is not considered a child in placement with the provider and does not count against the provider's bed capacity. When an in home service record is selected in the Service Specifics group box by pressing the appropriate radio button to the left of the record, the fields in the Service Details group box are displayed as null.
13. When a radio button is selected for an unlicensed or licensed service record and SERVICE\_TYPE.fl\_prvd\_rate = 'N' and SERVICE\_TYPE.fl\_pmnt\_allwd = 'Y', the Service Rate value is available for selection in the Options drop down box.
14. When a radio button is selected for an unlicensed or licensed service record and SERVICE\_TYPE.fl\_prvd\_rate = 'Y' and SERVICE\_TYPE.fl\_pmnt\_allwd = 'Y', the Provider Service Rate value is available for selection in the Options drop down box.



15. When a radio button is selected for an unlicensed or licensed service record and SERVICE\_TYPE.fl\_pmnt\_allwd = 'N', neither the Service Rate nor Provider Service Rate values are available for selection in the Options drop down box.
16. When a radio button is selected for an unlicensed or licensed service record and the Bed Reservation value is selected in the Options drop down box, the page opens in edit mode for Designated County workers or Treatment Foster Home workers. The Bed Reservation page is in view mode for non-Designated county workers or non-Treatment Foster Home workers.
17. The following logic is used for calculating the values in the Clients by Gender and Service Details group boxes. This information can be applied to the *SM10a: Out of Home Placements/In Home Services* topic paper as well.

*Upon final approval of an Out of Home Placement:*

- (1) Unreserves any bed reservations held for child that may have been made during a Placement Request.
- (2) Update appropriate age capacities for the Provider Organization based on age of child. Fields affected. Example:
  - Increment PO.QT\_PLCD\_UNDR2 by one
  - Increment PO.QT\_PLCD\_UNDR18 by one
- (3) Update the Provider Org total capacities:
  - Increment PO.QT\_TOT\_PLCD by one
  - Decrement PO.QT\_AVLB\_BEDCAP by one
- (4) Update Gender Specific Bed Capacities for Provider Org and Provider Service.

Strategy:

- To fill, place the Child into the appropriate bed based on the availability of other capacities. Attempt to first place the child in his/her respective bed type. If all gender specific beds have been occupied, place child into an Either bed. If all Either beds are filled, allow the gender specific capacities to go negative.

Note: QT\_ETHR\_PLCD should never be negative. In addition, there should never be a scenario where QT\_GENDER\_AVLB is negative while QT\_ETHR\_AVLB is greater than zero.

If Male

If, there are no Either beds available OR [no Male beds available AND no Either bed available] [IF, (PS.QT\_MALE\_AVLB > 0) OR ((PS.QT\_MALE\_AVLB <= 0) AND (PS.QT\_BOTH\_AVLB <= 0))]

Place child in a Male Bed by;

- increment PO.QT\_TOT\_MALE\_PLCD by one
- increment PS.QT\_MALE\_PLCD by one
- increment PS.QT\_TOT\_PLCD\_SRVC by one

Otherwise, place child in an Either if and only if (iff) an Either bed is available and male bed availability's have been exhausted [If (PS.QT\_ETHR\_AVLB > 0) AND (PS.QT\_MALE\_AVLB <= 0)]

Place child in an Either Bed by;

- increment PO.QT\_TOT\_ETHR\_PLCD by one
- increment PS.QT\_BOTH\_PLCD by one
- Increment PS.QT\_TOT\_PLCD\_SRVC by one

Else child is a Female

[Repeat the above logic for female capacities]

End If

(5) Update all Preferred Available capacities for Provider Org...

Strategy: Calculate the 'Preferred Available' capacities based on:

- (a) Provider's original preferences
- (b) number of beds placed
- (c) number of beds reserved
- (d) Home vs. Private Provider

If Home Provider (PO.FL\_HOME = 'Y')...

- $PO.QT\_MALE\_AVLB\_RSTR = PO.QT\_MALE\_PRVD\_RSTR - (PO.QT\_TOT\_MALE\_PLCD + PO.QT\_TOT\_MALE\_RSVD)$
- $PO.QT\_FEML\_AVLB\_RSTR = PO.QT\_FEML\_PRVD\_RSTR - (PO.QT\_TOT\_FEML\_PLCD + PO.QT\_TOT\_FEML\_RSVD)$
- $PO.QT\_ETHR\_AVLB\_RSTR = PO.QT\_ETHR\_PRVD\_RSTR - (PO.QT\_TOT\_ETHR\_PLCD + PO.QT\_TOT\_ETHR\_RSVD)$
- $PO.QT\_TOT\_AVLB\_RSTR = PO.QT\_TOT\_PRVD\_RSTR - (PO.QT\_TOT\_PLCD + PO.QT\_TOT\_RSVD)$

(6) Update All 'AVLB' capacities for Provider Service(s)

Strategy: To provider accurate Available Bed Capacities at the Provider Service level based on:

- (a) Number of Available beds for the Service - serviced based
- (b) Number of available Preferred Beds
- (c) The Overall number of available Provider Beds for home - Home Providers only

Note: For Private Providers, there is no tracking of available capacities (Gender specific and total capacities) at the Provider Organization level. Availability capacities are always serviced based. If Home Provider, perform the following for all Services for the provider in the PROVIDER\_SERVICE table. If Private Provider perform the following only for the specific service into which the child is placed.

I. Calculate Male Bed Availability...

- $QT\_MALE\_AVLB = \text{Minimum of}$ 
  - (a) number of beds available for service  
 $[PS.QT\_CAP - (PS.QT\_TOT\_PLCD\_SRVC + PS.QT\_TOT\_RSVD\_SRVC)]$
  - (b) male beds available based on the preferred capacity  
 $[PO.QT\_MALE\_AVLB\_RSTR]$  (calculated previously in step 5)
  - (c) number of Beds available for Provider(Home Providers Only)  
 $[PO.QT\_TOT\_AVLB\_BEDCAP]$  (calculated previously in step 3)

II. Calculate Female Bed Availability...

- $QT\_FEML\_AVLB = \text{Minimum of}$ 
  - (a) number of beds available for service

$$[\text{PS.QT\_CAP} - (\text{PS.QT\_TOT\_PLCD\_SRVC} + \text{PS.QT\_TOT\_RSVD\_SRVC})]$$

(b) female beds available based on the preferred capacity

$$[\text{PO.QT\_FEML\_AVLB\_RSTR}] \text{ (calculated previously in step 5)}$$

(c) number of Beds available for the Provider\_(Home Providers Only)

$$[\text{PO.QT\_TOT\_AVLB\_BEDCAP}] \text{ (calculated previously in step 3)}$$

### III. Calculate Either Bed Availability...

- QT\_ETHR\_AVLB = Minimum of

(a) number of beds available for service

$$[\text{PS.QT\_CAP} - (\text{PS.QT\_TOT\_PLCD\_SRVC} + \text{PS.QT\_TOT\_RSVD\_SRVC})]$$

(b) either beds available on the preferred capacity (Home Providers Only)

$$[\text{PO.QT\_ETHR\_AVLB\_RSTR}] \text{ (calculated previously in step 5)}$$

(c) number of Total Beds available for the Provider\_(Home Providers Only)

$$[\text{PO.QT\_TOT\_AVLB\_BEDCAP}] \text{ (calculated previously in step 3)}$$

### IV. Calculate Total Bed Availability...

- QT\_TOT\_AVLB\_SRVC = Minimum of

(a) number of beds available for service

$$[\text{PS.QT\_CAP} - (\text{PS.QT\_TOT\_PLCD\_SRVC} + \text{PS.QT\_TOT\_RSVD\_SRVC})] \text{ (calculated previously in step 4)}$$

(b) total beds available on the preferred capacity (Home Providers Only)

$$[\text{PO.QT\_TOT\_AVLB\_RSTR}] \text{ (calculated previously in step 5)}$$

(c) number of Beds available for the Provider\_(Home Providers Only)

$$[\text{PO.QT\_TOT\_AVLB\_BEDCAP}] \text{ (calculated previously in step 3)}$$

*Upon final approval of ending an Out of Home Placement:*

(1) Update appropriate age capacities for the Provider Organization based on age of child (Home Provider only):

- Decrement PO.QT\_PLCD\_UNDR2 by one
- Decrement PO.QT\_PLCD\_UNDR6 by one
- Decrement PO.QT\_PLCD\_UNDR18 by one

(2) Update the Provider Org's total capacities:

- Decrement PO.QT\_TOT\_PLCD by one
- Increment PO.QT\_TOT\_AVLB\_BEDCAP by one

(3) Update Provider Org and Provider Service Capacities based on the gender of the child...

Note: Gender of child must be known before child can be placed

Strategy: When releasing a bed from placement, our objective is to release the negative gender specific beds first, then the Either beds (Remember our rule for not allowing a gender specific availability to go negative when QT\_ETHR\_AVLB > 0). If, however, an either bed is released, additional calculation must be made to determine if a negative bed can be 'swapped' for the vacant Either bed.

(3a) If Child's Gender is Male...

If there has been at least one male bed placed...

[IF PS.QT\_MALE\_PLCD > 0]...

Remove the child from a Male Bed

- Decrement PO.QT\_TOT\_MALE\_PLCD by one
- Decrement PS.QT\_MALE\_PLCD by one
- Decrement PS.QT\_TOT\_PLCD\_SRVC

Otherwise If there has been at least one child placed in an Either bed, meaning all male beds placements have already been release [IF PS.QT\_ETHR\_PLCD > 0]...

Remove child from an Either bed...

- Decrement PO.QT\_TOT\_ETHR\_PLCD by one
- Decrement PS.QT\_ETHR\_PLCD by one
- Decrement PS.QT\_TOT\_PLCD\_SRVC

(A) Check if Female bed availability has gone negative, if so, swap the removal with the female bed, allowing female bed availability to be incremented by one. This logic tries to accomplish the freeing up of the gender specific beds FIRST before allowing the decline in Either bed capacities.

If Female availability is negative and at least one child had been placed in a female bed [IF PS.QT\_FEML\_AVLB < 0 AND PS.QT\_FEML\_PLCD > 0 ]...

Perform logic to switch female and either beds to increase female bed availability..

- Increment PS.QT\_ETHR\_PLCD by one
- Decrement PS.QT\_FEML\_PLCD by one
- Increment PO.QT\_TOT\_ETHR\_PLCD by one
- Decrement PO.QT\_TOT\_FEML\_PLCD by one

END IF

(3b) If Gender of Child is Female, Process the Above logic substituting FEML for MALE

(4) Update Provider Org's 'AVLB' columns identical to logic performed when processing a Placement

(5) Update Provider Service's AVLB columns identical to logic performed when processing a Placement

#### **1.2.5.4. Save Processing**

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if they would like to 'Save changes before closing the page.'
2. If the value entered into the Male, Female, or Total Preferences fields is greater than the Total Bed Capacity value, on save processing the worker will receive an error message stating "The value for "Preferences" must be less than or equal to the Total Bed Capacity."
3. If the Total Bed Capacity value is changed to less than the capacity for a given unlicensed service record, on save processing the worker will receive an error message stating "Unlicensed Service Capacities must be less than or equal to Total Bed Capacity."

4. If the Total Bed Capacity value is changed to less than the capacity for a given licensed service record, on save processing the worker will receive an error message stating "License Service Capacities must be less than or equal to Total Bed Capacity."
5. If Preferred Age From is greater than Preferred Age To in the Clients by Age group box, on save processing the worker will receive an error message stating "Min Age must be less than or equal to Max Age."
6. If the Preferred Age fields are not between 0 and 18 inclusive, on save processing the worker will receive an error message stating "Invalid Family Preferred Age."
7. If the Total Bed Capacity value is greater than or equal to 32767, on save processing the worker will receive an error message stating "Invalid Number – Total Bed Capacity."
8. If the Preferred Age To field is greater than 115, on save processing the worker will receive an error message stating "Invalid Family Preferred Age."
9. If a provider service rate is entered on the Provider Service Rate page for a licensed service that has a status of 'Inactive', on save processing, the licensed service will be set to 'Active'.
10. All capacity, gender, age min/max fields will be frozen on the License Page at the time of approval. Any updates to the capacity, gender and age min/max fields that are made on the Service's Tab of the Home Provider Page after the license is approved will generate the following alert: "The Provider Capacity, Gender Preference or Age Range fields have been updated. If you wish the license to be updated with this information please create a new license for the Provider."

#### 1.2.5.5.      **CRUD Matrix**

<b>Table Name</b>	<b>CRUD</b>
PROVIDER_ORG	RU
PROVIDER_SERVICE	CRU
PRVD_SRVC_RATE	CR
SERVICE_RATE	R
SERVICE_TYPE	R
LICENSE	R

### 1.2.6. Tab 5 – Training

**Basic**

Number: 20190    Name: Sally Safety    Type: Foster Home    Status: Active

Lcns. Type: Licensed by State of VA    Lcns. Agency: Unknown    HSRS Number: 2204020190

Home    Members    Characteristics    Services    **Training**

**Course Listing**

Course/Short Description	Offered By:	Start Date:	Date Complete:	Hrs Cmpl:	
Class B	ABC Training	07/01/2003	00/00/0000		<a href="#">Delete</a>
Class A	ABC Training	01/01/2003	01/05/2003	10	<a href="#">Delete</a>

[Insert](#)

Options:  [Go](#) [Save](#) [Close](#)

Done    Local intranet

#### 1.2.6.1. **Tab Overview**

Information about training classes and training history is documented using the Training Tab. Designated County and Treatment Foster Home workers are able to add and maintain training classes on the provider's record. Non-Designated County and non-Treatment Foster Home workers will not be able to create or update any training record entries. The Date Complete field will determine the order in which the training courses are displayed on the Home Provider Training Tab. This will aid the worker in assessing the training needs and training history of the provider. The worker can send the provider a letter regarding specific training information using the Training Letter template that is accessed from this page.

#### 1.2.6.2. **Tab Information**

**Box:** Course Listing  
**Fields:** Course/Short

	Description:	The name or description of the course the provider has or will take; User entered text box for Designated County workers or Treatment Foster Home workers; Required; No default value.
	Offered By:	The name of the resource offering the course to the provider; User entered text box for Designated County workers or Treatment Foster Home workers; Required; No default value.
	Start Date:	The date in which the course begins; User entered date field for Designated County workers or Treatment Foster Home workers; Required; Defaults to 00/00/0000.
	Date Complete:	The date that the provider completed the course; User entered date field for Designated County workers or Treatment Foster Home workers; Not required; Defaults to 00/00/0000.
	Hrs. Cmpl:	The number of hours completed by the provider for the given course; User entered numeric field for Designated County workers or Treatment Foster Home workers; Not required; No default value.
<b>Links:</b>	Delete	Allows the worker to delete a training record from the Course Listing group box. Not available for non-Designated County workers or non-Treatment Foster Home workers.
<b>Options:</b>	Provider Training Checklist	Navigates the worker to the Provider Training Checklist page. The checklist opens in view mode for non-Designated County workers and non-Treatment Foster Home workers.
	Training Info Letter	Navigates the worker to the Training Information Letter template. The document opens in view mode for non-Designated County workers or non-Treatment Foster Home workers.
<b>Buttons:</b>	Insert:	Adds a new training record in the Course Listing group box. Disabled for non-Designated County workers or non-Treatment Foster Home workers.
	Save:	Standard Save Processing
	Close:	Standard Close Processing

### 1.2.6.3. Background Processing

Note: Unless otherwise stated, the work listed below can only be completed by workers of the Designated County or by a Treatment Foster Home worker if the Provider is a Treatment Foster Home.

1. The county of the worker accessing the page (WORKER.CD\_OFC\_DIV) will always be screened to establish whether it matches the Designated County (PROVIDER.ORG.CD\_DES\_CNTY) of the Home Provider record **when the provider type is any value other than Treatment Foster Home.**
2. When the Insert button is selected, a new record is added to the Course Listing group box. This button is disabled for non-Designated County workers and non-Treatment Foster Home workers.

3. The Delete hyperlink located to the right of each training record and is enabled for Designated County and Treatment Foster Home workers. When the Delete hyperlink is selected, the worker receives a notification message stating “Are you sure you want to delete currently selected information?” If the worker selects ‘Yes’, the training record is will removed from the Course Listings group box and the worker is returned to the Training tab.
4. The sorting order of the list is based on the completion date of the course. This will display the most current history about training first.
5. In the event that there are more training courses listed than the viewable page allows, the system will automatically provide a scroll bar so the worker may scroll through the list of courses.

#### **1.2.6.4. Save Processing**

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering ‘Yes’ when the system asks the user if they would like to ‘Save changes before closing the page.’
2. The Course/Short Description, Offered By, and Start Date fields are required and cannot have a null value at time of save processing. If any of these fields are null, the user will receive an error validation stating “Please enter data in the fields which are highlighted - <field name>.”
3. If the Date Complete value is less than the Start Date value, on save processing the worker will get an error message stating “Start Date is later than End Date. Please correct.”
4. If the Date Complete value is greater than current system date, on save processing the worker will get an error message stating “Date completed can not be a future date.”

#### **1.2.6.5. CRUD Matrix**

<b>Table Name</b>	<b>CRUD</b>
PROVIDER_ORG	R
PROVIDER_TRAINING	CRUD



### 1.2.7. Pop-up Page-Provider Repayment Method

Provider Repayment Method -- Web Page Dialog

eWiSACWIS Print Spell Check Help

County: Milwaukee

Maximum Estimated Reduction Amount: \$0.00

**Repayment Method**

☐ Reduce by Individual Overpayments

☐ Reduce by All Overpayments

☒ Reduce Future Payments by... Monthly Amount: \$0.00

Save Close

#### 1.2.7.1. Page Overview

The Provider Repayment Method pop-up page is accessed through the Options drop down box on the Home Provider page, Home tab. DHFS staff members use this page to manage the provider repayment method at the provider/county level. This means that each county can maintain a repayment method for each provider. Workers can also indicate that the repayment method for a provider/county will be handled at the individual payment level. Designating repayment method at the individual payment level is discussed in detail in the *FM01: Process Payments* topic paper.

**1.2.7.2. Page Information**

<b>Fields:</b>	County	<ul style="list-style-type: none"><li>- Page retrieves the repayment method record from the PROV_REPMNT_MTHD table that matches the worker's county (if this record exists).</li><li>- If a repayment method record DOES NOT exist, County equals Worker's County.</li><li>- If the repayment method record DOES NOT exist, the record is created when the worker clicks Save.</li><li>- County field is enabled if worker's User Group has the "View All Counties" flag checked (SCR TY_GRP_PRFL.fl_county = 'Y').</li><li>- If the County field is enabled it<ul style="list-style-type: none"><li>- Displays the list of counties,</li><li>- Allows workers to select a different county's repayment method by selecting a county from the drop down</li><li>- If worker's county &lt;&gt; repayment county; repayment method is VIEW ONLY</li></ul></li><li>- If a selected county has not designated a Repayment Method for this Provider, the following edit message will be displayed: "There is no Repayment Method for this County for this Provider. The window will return to the previous County." " and the worker will be returned to their county's repayment method record.</li></ul>
	Maximum Estimated Reduction Amount	<p>This field displays the estimated amount by which the provider's next check will be reduced. It is always disabled. If repayment method = R, field displays \$0.00.</p> <p>If repayment method = I, display (sum of PAYMENT.am_reduce) – (sum of PAYMENT_ADJUST.am_rqst) for approved outstanding overpayments and approved adjustments for the provider/county.</p> <p>If repayment method = A, display (sum of PAYMENT.am_rqst) – (sum of PAYMENT_ADJUST.am_rqst) for approved outstanding overpayments and approved adjustments for the provider/county.</p>
<b>Box:</b>	Repayment Method	
<b>Fields:</b>	Reduce By Individual Overpayments:	<p>This option (cd_ovp_mthd = I) indicates that the repayment method for this Provider/County is being handled at the individual overpayment level.</p> <p>If the worker selects "Reduce by Individual Overpayments" PROV_REPMNT_MTHD.am_reduce = \$0.00</p>

Reduce By Total Overpayment Amount:	Selecting this option (cd_ovp_mthd = T) designates that the total of all overpayments made to this provider in this county should be removed from the provider's next check from this county. If the worker selects "Reduce by Individual Overpayments" PROV_REPMNT_MTHD.am_reduce = \$0.00
Reduce Future Payments by . . .	Selecting this option (cd_ovp_mthd = R) designates that this amount designated in the Monthly amount field should be removed from the provider's next check from this county. This option is the default selection for new providers.
Monthly Amount:	This field is enabled only when the 'Reduce Future Payments by ...' repayment method is selected and is required if this option is selected. Workers use this field to designate the dollar amount to be deducted on a monthly basis from payments made to the provider from this county. A monthly amount of \$0.00 is the default value for new providers.

**Buttons:**    Save:                    Standard Save Processing  
                 Close:                    Standard Close Processing

### **1.2.7.3.            Background Processing**

Note: Unless otherwise stated, the work listed below can only be completed by workers of the Designated County or by a Treatment Foster Home worker if the Provider is a Treatment Foster Home.

1. Workers will be able to view the Provider Repayment Status page or edit the page based on their security level.
2. The worker's county does not have to match the Provider's Designated County to open the pop-up page.
3. Workers with the following flag set SCRTY\_GRP\_PRFL.fl\_county = 'Y', can view Payment Status for ALL Counties.
4. If a selected county has not designated a Repayment Method for the Provider, the following edit message will be displayed on change of the County value: "There is no Repayment Method for this County for this Provider. The window will return to the previous County." and the worker will be returned to their county's repayment method record.

### **1.2.7.4.            Save Processing**

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if they would like to 'Save changes before closing the page.'
2. On change of the County value, the user will receive a notification message stating "Do you wish to save the County changes and continue?" When selecting 'Yes', the current record saves to the database and the appropriate county record is retrieved from the database based on the county value selected in the County drop down box.

**1.2.7.5.      CRUD Matrix**

<b>Table Name</b>	<b>CRUD</b>
PROV_REPMNT_MTHD	CRU
PROVIDER_ORG	R
PAYMENT	R
PAYMENT_ADJUST	R
APPROVAL	R
WORKER	R

### 1.2.8. Pop-up Page – Parent Agency History

**Parent Agency History -- Web Page Dialog**

**eWiSACWIS** Print Spell Check Help ?

**Home Provider Information**

Provider Name: Sally Safety Provider ID: 20190

**Parent Agency History**

Parent Agency ID	Parent Agency Name	Start Date	End Date	Date Entered
20176	Wisconsin Group Home	00/00/0000	00/00/0000	07/23/2003
20190	Sally Safety	07/31/2000	00/00/0000	08/11/2001

Insert

Continue Close

#### 1.2.8.1. Page Overview

Note: The page will open in view mode for non-Designated County workers.

The Parent Agency History pop-up page is used to document the provider's Parent Agency history. To view, add or change Parent Agency information, the Designated County worker or **Treatment Foster Home** worker selects the Parent Agency History value from the Options drop down box on the Home Tab of the Home Provider page and then selects the Go button. This will launch the Parent Agency History page (illustrated above). The worker at this point can view the Parent Agency History, including the following fields:

- Parent Agency ID
- Parent Agency Name
- Start Date
- End Date
- Date Entered

In addition to this information, the Provider Name and the Provider ID are viewable in the Home Provider Information group box. The designated worker selects the Insert button to launch the Provider Search.

**PLEASE NOTE:** the Parent Agency must be in the system in order to be returned during the data retrieval Provider Search. If the Parent Agency does not exist, the worker will need to exit the search and Parent Agency History page, and then create the provider that will become the Parent Agency.

Assuming the Parent Agency exists, the search returns the provider and the worker selects the radio button to the left of the appropriate provider record. After pressing the Continue button on the Provider Search page, the system returns the Parent Agency information back to the Parent Agency History page in a new row.

The worker enters the Start Date of the new Parent Agency and the End Date of the old Parent Agency. The worker can backdate the Start Date of the new Parent Agency if needed. However, if the worker enters a future date in the Start Date of the new Parent Agency they will receive a message informing them that Start Date cannot be greater than today's date.

An edit to ensure that the start date of the new Parent Agency and end date of the prior Parent Agency are two consecutive dates will be enforced. If the dates are not in sequence the worker will receive the following error:

“The Start Date of the new Parent Agency must be one day after the End Date of the previous Parent Agency.”

In the event that the Provider is ending a relationship with a Parent Agency, the worker would select the Parent Agency History pop-up page and complete the ending date field for the old Parent Agency. The worker would search for, and assign the provider as their own Parent Agency.

#### **1.2.8.2. Page Information**

**Box:** Home Provider Information

**Fields:** Provider Name: Name of the provider; System derived from Home Provider page; Not user editable.  
Provider ID: The unique ID number assigned to the specific Home Provider; System derived from Home Provider page; Not user editable.

**Box:** Parent Agency History

**Fields:** Parent Agency ID: The unique ID number assigned to the Provider; This is the ID of the provider assigned as the Parent Agency; System derived from record selected on the Provider Search page; Not user editable; Defaults to the Home Provider's ID upon final screening in of the Home Inquiry record.  
Parent Agency: The name of the Parent Agency assigned to the Home Provider; System derived from record selected on the Provider Search page; Not user editable; Defaults to the Home Provider's name upon final screening in of the Home Inquiry record.  
Start Date: The date when the Parent Agency begins its association with the Home Provider; User entered date field for Designated County workers prior to initial save processing; Required; Defaults to 00/00/0000.

	End Date:	The date when the Parent Agency ends its association with the Home Provider; User entered date field for Designated County and Treatment Foster Home workers prior to initial save processing for an old Parent Agency record; Not required until new Parent Agency record is inserted; Defaults to 00/00/0000.
	Date Entered:	Date that the Parent Agency record is inserted into the Parent Agency History page; System generated date; Not user editable; Defaults to current system date.
<b>Buttons:</b>	Insert:	Launches the Provider Search page. The button is disabled for non-Designated County workers or non-Treatment Foster Home workers.
	Continue:	Returns the user to the Home Provider page with the new information on the Parent Agency page.
	Close:	Standard Close Processing

### 1.2.8.3. Background Processing

Note: Unless otherwise stated, the work listed below can only be completed by workers of the Designated County or by a Treatment Foster Home worker if the Provider is a Treatment Foster Home.

1. When pressing the Insert button, the Provider Search page opens. After searching for and selecting a provider on the Provider Search page, the worker selects the Continue button. The selected provider information is returned to the Parent Agency History page in a new record in the Parent Agency History group box.
2. If a worker has returned a new provider to the Parent Agency History page and presses the Insert button again, the worker will receive an error message "Please enter Start Date for the New Parent Agency."
3. Pressing the Continue button on the Parent Agency History page does not commit the newly entered data to the database. When the Continue button is selected, business validations are thrown. If the entered information passes all business validations, the Parent Agency History page is closed and the worker is navigated to the Home Provider page, Home tab.
4. If a worker has returned a new provider to the Parent Agency History page and presses the Continue button, the worker will receive an error message "Please enter Start Date for the New Parent Agency."
5. If a worker has returned a new provider to the Parent Agency History page, enters a Start Date that is greater than current system date, and presses the Continue button, the worker will receive an error message "Start Date cannot be greater than Today's date."
6. If a worker has returned a new provider to the Parent Agency History page, does not enter an End date for the old parent agency record, and presses the Continue button, the worker will receive an error message "Please enter the End Date for the last Parent Agency."
7. If a worker has returned a new provider to the Parent Agency History page, enters an End Date that is less than the Start Date for the old parent agency record, and presses the Continue button, the worker will receive an error message "The End Date should be greater than or equal to the Start Date for the Previous Parent Agency."

8. If a worker has returned a new provider to the Parent Agency History page, enters a Start Date for the new record that is not one day after the End Date for the old parent agency record, and presses the Continue button, the worker will receive an error message “The Start Date of the new Parent Agency must be one day after the End Date of the previous Parent Agency.”
9. If a worker has returned a new provider to the Parent Agency History page, enters valid dates, and presses the Continue button, the worker will return to the Home Provider page. The Parent Agency field on the Home tab will update with the new Parent Agency name.

#### 1.2.8.4. Save Processing

1. Save processing for the Parent Agency History page is conducted on the Home Provider page. After entering information on the Parent Agency History page and pressing the Continue button, the worker is navigated to the Home Provider page, Home tab. On save processing on the Home Provider page, changes made on the Parent Agency History page are committed to the database.
2. Save processing populates the placement ending purpose (Episode.cd\_ending\_purpose). Use Code\_Desc.tx\_desc\_med where Code\_Desc.id\_grp=' EPSDPLED' and Code\_Desc.id\_grpi = end reason code value to determine the ending purpose associated with the 'Parent Agency Update' or 'Placement Made in Error' end reason.
3. On save processing from the Home Provider page, the id\_bsns in the following tables are updated to reflect the new parent agency: PARENT\_AGENCY (new record is created), PROVIDER\_ORG, PROVIDER\_PART, PROVIDER\_PART\_STAT, PROVIDER\_SERVICE, PROVIDER\_CHAR, LICENSE, PROVIDER\_TRAINING, PRVD\_SRVC\_LCNS, and PRVD\_SRVC\_RATE.
4. On save processing from the Home Provider page, if any open placements exist, the placements are closed with the reason of “Parent Agency Update” (ignore all placement that override PA rules).
5. On save processing from the Home Provider page, if the Parent Agency change is backdated prior to the placement begin date, the placement associated with the old Parent Agency will be closed for reason of “Placement Made In Error” (including both paid and unpaid episodes). Parent Agency effective date <= the placement begin date (ignore all placement that override PA rules).
6. On save processing from the Home Provider page, the system would generate an automated message to the ongoing caseworker reminding them to enter the new placement information due to the changes with the Parent Agency.

#### 1.2.8.5. CRUD Matrix

Table Name	CRUD
PROVIDER_ORG	RU
PARENT_AGENCY	CRU
PROVIDER_PART	U
PROVIDER_PART_STAT	U
PROVIDER_SERVICE	U



PROVIDER_CHAR	U
LICENSE	U
PROVIDER_TRAINING	U
PRVD_SRVC_LCNS	U
PRVD_SRVC_RATE	U

### 1.2.9. Pop-up Page – Member Status

**Member Status -- Web Page Dialog**

eWiSACWIS

Print Spell Check Help

Action Requested: Deactivate  
 Name: Sally Safety  
 Worker: Caitlin Cake  
 Reason:   
 Effective Date: 00/00/0000

**Participant History**

Status	Effective Date	Reason	Worker
Active	07/31/2000	Initial	Caitlin Cake

Save Close

#### 1.2.9.1. Page Overview

Note: Non-Designated County workers are not able to open these pages on providers. Non-Treatment Foster Home workers are not able to open these pages when the Provider is a Treatment Foster Home. The hyperlinks are disabled in the Home Members group box. The functions described below relate to Designated County workers or Treatment Foster Home workers, only.

This page is used to maintain the status of the home members and is accessed from the Members tab of the Home Provider page by selecting the appropriate hyperlink to the right of a home member's record in the Home Members group box. The Action Requested field on the Member Status page contains the value that correlates to the hyperlink selected on the Members tab. For example, if the Deactivate link is selected for a home member on the Members tab, the Action Requested value on the Members Status page will be 'Deactivate'.

If a member's status is changed via the Members Status page, the status will be reflected on the Members tab. If the Deactivate hyperlink is selected for a home member on the Members tab

and the worker completes all required information on the Member Status page, upon returning to the Members tab, the participant's status changes to 'Inactive'.

If for some reason, a person was included in the household members as a result of an error, then the worker can select the Remove hyperlink and remove that person from further association with that provider. The status of the individual will be listed as 'Removed' and the reason will be included by mistake.

#### **1.2.9.2. Page Information**

<b>Fields:</b>	Action Requested:	The type of status change occurring on behalf of the home member; Possible values are 'Deactivate', 'Reactivate', and 'Remove'; System derived based on the hyperlink selected on the Members tab; Not user editable; Defaults to action selected from the Members tab.
	Name:	The name of the participant for which the action is being documented; System derived from the home member selected on the Members tab; Not user editable; Defaults to participant name selected from the Members tab.
	Worker:	The name of the worker documenting the member's change of status; System derived from the worker's log-in; Not user editable; Defaults to logged in worker's name.
	Reason:	The reason for the change of status; User selected drop down box; User editable; Required; No default value.
	Effective Date:	The effective date of the change in status; User entered date field; User editable; Required; Defaults to 00/00/0000.
<b>Box:</b>	Participant History	
<b>Fields:</b>	Status:	The status change value; Displayed for the history of status changes; System derived from the Provider Participant Status table; Not user editable.
	Effective Date:	The effective date of the change in status; Displayed for the history of status changes; System derived from the Provider Participant Status table; Not user editable.
	Reason:	The reason for the change of status; Displayed for the history of status changes; System derived from the Provider Participant Status table; Not user editable.
	Worker:	The name of the worker documenting the change of status; Displayed for the history of status changes; System derived from the Provider Participant Status table; Not user editable.
<b>Buttons:</b>	Save:	Standard Save Processing
	Close:	Standard Close Processing

#### **1.2.9.3. Background Processing**

Note: Unless otherwise stated, the work listed below can only be completed by workers of the Designated County or by a Treatment Foster Home worker if the Provider is a Treatment Foster Home.

1. The Action Requested value is dependent on the hyperlink selected on the Members tab. This value is determined by either the Deactivate, Reactivate, or Remove hyperlink.
2. The values in the Reason drop down box are filtered based on the Action Requested value.
3. Rows in the Participant History group box are sorted in reverse chronological order by Effective Date.

#### **1.2.9.4. Save Processing**

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if they would like to 'Save changes before closing the page.'
2. The Reason and Effective Date fields are required and cannot have a null value at time of save processing. If either of these fields are null, the user will receive an error validation stating "Please enter data in the fields which are highlighted - <field name>."
3. On save processing, the home member's status on the Members tab is updated to reflect the change in status. If the Action Requested value is 'Deactivate', the home member's status on the Members tab is updated to 'Inactive'. If the Action Requested value is 'Reactivate', the home member's status on the Members tab is updated to 'Active'. If the Action Requested value is 'Remove', the home member's status on the Members tab is updated to 'Remove'.
  - a. If the member selected for deactivation has the role of Parent 1, on save processing, the member's role is changed to 'Previous Parent 1' on the Members tab.

#### **1.2.9.5. CRUD Matrix**

<b>Table Name</b>	<b>CRUD</b>
PROVIDER_PART_STAT	CRU
PROVIDER_PART	RU
PERSON	R

### 1.2.10. Pop-up Page - Bed Reservation

Client	Worker	Expiration	Release Bed
Amy Abby	Dan Daisy	05/18/2003	<input type="checkbox"/>

Save Close

#### 1.2.10.1. Page Overview

Note: This pop-up page opens in view-mode for non-Designated County workers and non-Treatment Foster Home workers when the Provider is a Treatment Foster Home.

The Bed Reservation pop-up page is accessed from the Options drop down box on the Services tab of the Home Provider and Private Provider pages.

The pop-up page allows the worker to view the status of the bed reservations with regard to both the Client and the Worker involved. The worker selects the radio button to the left of the desired service row in the Service Specifics group box and then selects the Bed Reservation value from the Options drop down box. After selecting the Go button to the right of the Options drop down box, the Bed Reservation page opens. The expiration date of reservation can also be viewed from this page. Using this page, a Designated County or Treatment Foster Home worker can release a reserved bed if it is no longer needed by checking the Release Bed checkbox.

#### 1.2.10.2. Page Information

<b>Fields:</b>	Client:	The name of the client associated with the bed reservation; System derived; Not user editable.
	Worker:	The name of the worker who made the bed reservation for the specific client; System derived; Not user editable.
	Expiration:	The date of expiration for the reservation; System derived; Not user editable.
	Release Bed:	Indicates that selected bed is no longer needed; User selected check box for a Designated County worker or Treatment Foster Home worker; User editable; Not required; Defaults to unchecked.
<b>Buttons:</b>	Save:	Standard Save Processing
	Close:	Standard Close Processing

### 1.2.10.3. Background Processing

Note: the Bed Reservation page opens in view-mode for non-Designated County workers and non-Treatment Foster Home workers.

1. The county of the worker accessing the page (WORKER.CD\_OFC\_DIV) will always be screened to establish whether it matches the Designated County (PROVIDER.ORG.CD\_DES\_CNTY) of the Home Provider record when the provider is not a Treatment Foster Home.
2. The fields are pre-filled based on any current reservations associated with the provider.

### 1.2.10.4. Save Processing

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if they would like to 'Save changes before closing the page.'
2. Upon save, if the Release Bed checkbox is checked, the bed reservation table is updated with the new expiration date, which is the current date. The Bed Reservation Batch will clear the reservation for the current date overnight.
3. Upon save, if the Release Bed checkbox is checked, the Release Bed checkbox is disabled.

### 1.2.10.5. CRUD Matrix

Table Name	CRUD
BED_RESERVATION	RU
PERSON	R
WORKER	R
PROVIDER_ORG	R

### 1.2.11. Pop-up Page – Edit Unlicensed Services

Provider Id: 20190      Provider Name: Sally Safety  
County: Milwaukee      Total Bed Capacity: 10

**Unlicensed Services**

Category	Type	Status	Total Capacity
<input type="radio"/> AODA inpatient	AODA inpatient detox-drugs	Active	2
<input type="radio"/> Athletics	Athletic equipment	Active	0
<input checked="" type="radio"/> Group Care	Group Home	Active	5

[Delete](#) [Insert](#)

Options:  [Go](#) [Save](#) [Close](#)

#### 1.2.11.1. Page Overview

The Edit Unlicensed Services page is used to record unlicensed service types for a Home Provider. This page is accessed from the Home Provider page, Services tab for a given county. A Designated County worker can select the appropriate county from the county specific drop down box in the Service Specifics group box on the Services tab and press the Edit Unlicensed Services hyperlink. The Edit Unlicensed Services page will open for the selected county and the county's name will be displayed in the header information on this page. A non-Designated County or **non-Treatment Foster Home** worker can also access this page if assigned to the home provider, but only for the worker's county. The county specific drop down box on the Services tab will default to the non-Designated worker's county and be disabled. Section 1.2.5 provides detailed information regarding the Services tab for reference.

The Edit Unlicensed Services page is the area in which service capacities and statuses can be updated. These properties cannot be updated on the Services tab. For in home services (where SERVICE\_TYPE.fl\_in\_home = 'Y'), the Total Capacity field is disabled. Additionally, provider service rates can be created and updated on the Edit Unlicensed Services page. Service rates can

be accessed and viewed from this page. These pages are accessed via the Options drop down box for a specific service. Either the Provider Rate or Service Rate value will be available for a given service based on the service type definition in the SERVICE\_TYPE table. In some cases, neither option will be available for a service type that is not paid.

#### 1.2.11.2. Page Information

**Box:** Header information

<b>Fields:</b>	Provider ID:	The unique ID number assigned to the specific home provider; System derived from the Home Provider page; Not user editable.
	Provider Name:	The name of the home provider; System derived from the Home Provider page; Not user editable.
	County:	The county name for which the unlicensed services will be added; System derived from the Home Provider page; Not user editable.
	Total Bed Capacity:	The total bed capacity of the provider expressed in numerical terms; System derived from the Home Provider page; Not user editable.

**Box:** Unlicensed Services

<b>Fields:</b>	Category:	The list of service categories filtered by the county selected on the Services tab; User selected drop down box; User editable prior to initial save processing; Required; No default value.
	Type:	The list of unlicensed service types for a given county, filtered by the value selected in the Category field; User selected drop down box; User editable prior to initial save processing; Required upon selection of the Category value; No default value.
	Status:	Designates the current status of the service type associated with the provider for a given county; User selected drop down box; User editable; Required; Defaults to 'Inactive'.
	Capacity:	Stores the number of units that a provider can render for a given service type; User entered numeric field; User editable if SERVICE_TYPE.fl_in_home = 'N'; Required; No default value.

<b>Links:</b>	Delete	Removes the appropriate service type record from the Unlicensed Services group box. This link is only available prior to initial save processing for the service type record.
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<b>Options:</b>	Provider Service Rate	Launches the Provider Service Rate page. Only available when the radio button located to the left of the service type records is selected for a paid service type that requires a provider specific rate (SERVICE_TYPE.fl_prvd_rate = 'Y' and SERVICE_TYPE.fl_pmnt_allwd = 'Y').
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	Service Rate	Launches the Service Rate page. Only available when the
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		radio button located to the left of the service type records is selected for a paid service type that requires a service rate (SERVICE_TYPE.fl_prvd_rate = 'Y' and SERVICE_TYPE.fl_pmnt_allwd = 'Y'). The Service Rate page opens in view only mode.
<b>Buttons:</b>	Insert	Adds a new service type record to the Unlicensed Services group box.
	Save	Standard Save Processing
	Close	Standard Close Processing

### 1.2.11.3. Background Processing

1. When accessing this page from the Services tab, the header information on the Edit Unlicensed Services page fills with the values from the Home Provider page.
2. When accessing this page from the Services tab where the capacity information on the Services tab has been updated but not saved, the user will receive a notification message stating "This action will save the home provider information. Do you want to continue?" If the worker selects 'Yes', the capacity information saves and the worker is navigated to the Edit Unlicensed Services page.
3. When pressing the Insert button, a new record is added to the Unlicensed Service group box. The Status field is defaulted to 'Inactive'.
4. When a new record is added to the Unlicensed Services group box, the Category values are filtered based on the county selected on the Services tab. This is the same county that is displayed on the header of the Edit Unlicensed Services page.
5. After selecting a Category value for a new service record, the Type field becomes enabled and required. The values in the Type field are filtered based on the value selected in the Category field.
6. After selecting a Type value, if the service type is an in home service (SERVICE\_TYPE.fl\_in\_home = 'Y'), the Total Capacity field will be disabled and set to 0.
7. After selecting a Type value, if the service type is a paid service that requires a provider service rate (SERVICE\_TYPE.fl\_prvd\_rate = 'Y' and SERVICE\_TYPE.fl\_pmnt\_allwd = 'Y'), the Options drop down box will appear in the lower left of the Edit Unlicensed Services page. The Provider Service Rate value will be available for selection in the Options drop down box. Whenever a service type record is selected that has these properties (by selecting the radio button to the left of the service record), the Provider Service Rate value is visible in the Options drop down box.
8. After selecting a Type value, if the service type is a paid service that requires a service rate (SERVICE\_TYPE.fl\_prvd\_rate = 'N' and SERVICE\_TYPE.fl\_pmnt\_allwd = 'Y'), the Options drop down box will appear in the lower left of the Edit Unlicensed Services page. The Service Rate value will be available for selection in the Options drop down box. Whenever a service type record is selected that has these properties (by selecting the radio button to the left of the service record), the Service Rate value is visible in the Options drop down box.
9. The Delete hyperlink is enabled when a service record is newly added to the Unlicensed Services group box and initial save processing has not been triggered. When the Delete

hyperlink is selected, the worker receives a notification message stating “Are you sure you want to delete currently selected information?” If the worker selects ‘Yes’, the service type record is will removed from the Unlicensed Services group box and the worker is returned to the Edit Unlicensed Services page.

10. When inserting a new service type in the Unlicensed Services groupbox, after the user selects a value from the Type dropdown, the system checks whether:
  - a) The service type is ongoing and paid according to a provider-based rate, (Service\_Type.fl\_pmnt\_allwd='Y' and Service\_Type.fl\_prvd\_rate='Y' and Service\_Type.fl\_recr\_elig='Y').
  - b) The selected service type has an associated SWRG (Service\_Type.cd\_sw\_rpt\_grp)
  - c) There is at least one row in Statewide\_Prvd\_Srvc\_Rate table for the associated SWRG and for the provider (Statewide\_Prvd\_Srvc\_Rate.cd\_sw\_rpt\_grp = Service\_Type.cd\_sw\_rpt\_grp and Statewide\_Prvd\_Srvc\_Rate.id\_prvd\_org = Provider\_Service.id\_prvd\_org)

If the three conditions are met, the user receives a message that says ‘Statewide rates exist for this service type and provider. After saving your changes, please review the copied over rates.’ Also, the Provider Service Rate option will not be available (until the information is saved).

Upon save, the associated records (Statewide\_Prvd\_Srvc\_Rate.cd\_sw\_rpt\_grp = Service\_Type.cd\_sw\_rpt\_grp and Statewide\_Prvd\_Srvc\_Rate.id\_prvd\_org = Provider\_Service.id\_prvd\_org) from the Statewide\_Prvd\_Srvc\_Rate table are copied to the Prvd\_Srvc\_Rate table.

#### **1.2.11.4. Save Processing**

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering ‘Yes’ when the system asks the user if they would like to ‘Save changes before closing the page.’
2. Upon save processing, if a newly added active service record requires a provider service rate (SERVICE\_TYPE.fl\_prvd\_rate = ‘Y’) and a provider service rate has not been entered, the worker will receive an error message stating “Effective Provider Service Rate needed.”
3. Upon save processing, the Category and Type fields become disabled. Only the service record’s status and capacity can be modified after initial save processing. Additionally, the Delete hyperlink is no longer available for the service record.
4. If a value entered into the Total Capacity field for a service type is greater than the Total Bed Capacity for the home provider, on save processing, the user will receive an error message stating “Total Service Capacity of both Active and Inactive services must be less than or equal to Total Bed Capacity.”

**1.2.11.5.      CRUD Matrix**

<b>Table Name</b>	<b>CRUD</b>
PROVIDER_ORG	R
PROVIDER_SERVICE	CRU
PRVD_SRVC_RATE	CR

### 1.3. **Inventories**

#### 1.3.1. **Table Descriptions**

<b>Table Name</b>	<b>Description</b>
ADDRESS	This table maintains all ADDRESS information pertaining to a PERSON, except Intake Report (Report and Referral). Address detail consists of home, business and any other address that is identified as required for WiSACWIS processing. Processes of CM01 (Manage Person) build and maintain this information.
APPROVAL	The APPROVAL table stores information about all Approvals in WiSACWIS. All related WiSACWIS processes build and maintain this data.
BED RESERVATION	The BED RESERVATION table stores all bed reservations initiated by a placement request for a specific provider organization.
COUNTY PROVIDER CROSS REF	This table contains each counties Provider ID, and cross references that ID to a single WiSACWIS Provider ID. Each County may have a different ID reference to a WiSACWIS Provider ID.
EPISODE	The EPISODE table maintains information pertaining to the occurrence of the delivery of one or more out-of-home SERVICES involving one PROVIDER and one or more CASE PARTICIPANTs. Placement out of home and removal from home are other types of Episodes stored in this table. Processes of SM10a (Out of Home Placement) build and maintain this information.
LICENSE	This table maintains information pertaining to the authorizations from DHFS or the county agency regarding a PROVIDER ORG's ability to operate a specific business (Foster home, group home). Data maintained in this table includes: provider id, license description and authorization, status, type and various indicators such as home study completed, background check completed, etc. Records are created by PM04a (Licensing).
PARENT AGENCY	Contains a history of parent agencies associated with a child agency.
PAYMENT	The PAYMENT table stores detailed information about payments made to providers including but not limited to service begin date, service end date, payment amount,

	provider, child, case, and payee. Processes of FM01 (Process Payments) maintain and update this information.
PAYMENT_ADJUST	The PAYMENT_ADJUST table stores detailed information about adjustments made against provider overpayments. Processes of FM01 (Process Payments) maintain and update this information.
PERSON	This PERSON table maintains information that identifies an individual known to DHFS or the county child welfare division such as name, date of birth, social security number, race, sex, etc. A PERSON can be a WORKER, REPORT PART, REFERRAL PART, CASE PART or PROVIDER PART. Primary search processing is centered around this data. Processes of CM01 (Manage Person) build and maintain this information.
PROVIDER CHAR	The PROVIDER CHAR table stores special characteristics of provider organization.
PROVIDER ORG	This table maintains information pertaining to a PROVIDER ORG, facility or vendor. Data includes name and address information, placement preferences and home condition description. Records in PROVIDER ORG table are created in PM02a/b (Maintain Home/Private Provider) and updated in PM04a (Licensing Home Provider).
PROVIDER PART	This table maintains information detail about the PERSONs associated with a provider (other than children in placement) about whom DHFS is required to collect and maintain information. Provider participants are associated only with Adoptive and Foster Homes. The PROVIDER PART record is created in PM04a (Licensing Home Provider) and updated in PM02a (Maintain Home Provider).
PROVIDER PART STAT	Documented changes in status of Provider Participants. Example: Active & Inactive.
PROV REPMNT MTHD	The PROV REPMNT MTHD table stores the method in which overpayments are to be recouped from a specific provider by county.
PROVIDER SERVICE	This table maintains information associated with SERVICES and their association to a PROVIDER ORG, such as a foster home or group home or facility, including cumulative counts of resources such as bed counts by service and provider as needed. Information maintained in Provider Service will also support worker services such as sexual abuse counseling and adolescent counseling provided by authorized workers. Records are created and updated by the following topics:

	PM02a/b (Maintain Home/Private Provider), PM06 (Reservation), SM10a (Out of Home Placement), and PM04a (Licensing Home Provider).
PRVD SRVC LCNS	This table stores PRVD SRVC LCNS information. This is a unique combination of the Provider and their licenses and the services offered by their license(s). Processes of SM04a (Licensing Home Providers) build and maintain this information.
PRVD SRVC RATE	The PRVD SRVC RATE table maintains history information for daily and monthly rates of all the services available from a certain provider organization. Processes of PM01 (Maintain Services) build and maintain this information.
PROVIDER TRAINING	This table maintains the information pertaining to the PROVIDER TRAINING such as hours a foster parent spends in training. PM03 (Train and Support Families) creates and maintains information in the table.
SERVICE RATE	This table houses the rate(s) information associated with Service Types. This information is created and maintained in PM01 (Maintain Services).
SERVICE TYPE	SERVICE TYPE table maintains information associated with any defined category of provider service offered by DHFS or the county organization including training requirements, standard rate (across all provider organizations) and license requirements etc., associated with providers. Processes of PM01 (Maintain Services) and WiSACWIS table maintenance build and maintain this data.
WORKER	The WORKER table maintains information pertaining to an individual (PERSON) who is employed by a county or DHFS and is in a job class that provides services and/or a job class that receives WiSACWIS-defined work assignments. The information is created in CM18 (Manage Worker).

### 1.3.2. Drop Downs

**Field Name:** Type- Basic group box

**Table Name:** Code\_Desc

**Group Id:** PRVDTYPE

**Field Name:** Status- Basic group box

**Table Name:** Code\_Desc

**Field Name:** Lcns. Type- Basic group box

**Table Name:** Code\_Desc

**Field Name:** Primary Language  
**Table Name:** Code\_Desc  
**Group Id:** LANGUAGE

**Field Name:** Marital Status  
**Table Name:** Code\_Desc  
**Group Id:** MRTLSTAT

**Field Name:** County (on all tabs)  
**Table Name:** Code\_Desc  
**Group Id:** REGION

**Field Name:** Role- Home Members group box  
**Table Name:** Code\_Desc  
**Group Id:** PRVDROLE

**Field Name:** Service Group  
**Table Name:** Code\_Desc  
**Group Id:** SUBCTGRY

**Field Name:** Service Type  
**Table Name:** Service Type

**Field Name:** Status- Edit Unlicensed Services  
**Values:** Active  
Inactive

**Field Name:** Reason  
**Table Name:** Code\_Desc  
**Group Id:** PRVDSTRS

**Field:** 'Family Accepts' Characteristics  
**Table Name:** Code\_Desc  
**Group Id:** PRVDCHAR

**Field:** 'Other Family' Characteristics  
**Table Name:** Code\_Desc  
**Group Id:** PRVDCHAR

### 1.3.3. Automated Messages

The following automated message is generated when the Provider Service Status changes for a service with current placements.

#### **Provider Service Status Change**

Field	Required	Parameters Passed
To	Yes	ID of all workers assigned to cases involving children in placement with the provider.
Cc	No	
Subject	Yes	Change in Provider Service Status
Message Box	Yes	“There has been a change in the status of Provider Service for Provider {provider name} currently providing care for children in your caseload.”

The following automated message is generated when the Parent Agency is updated and the new Parent Agency effective date is greater than the placement begin date.

#### **Parent Agency Update**

Field	Required	Parameters Passed
To	Yes	Worker Name/from Street Talk ID
Cc	Yes	Worker’s Supervisor Out of Home Care Unit Worker
Subject	Yes	Placement/Parent Agency Change
Message Box	Yes	{ <i>Provider Name</i> } has had Parent Agency update. The current placement for { <i>Child Name</i> } has been ended with an effective date of { <i>Parent Agency Start Date less one day</i> }. Please verify service type and rate information and create a new placement for this child with a placement begin date of { <i>Parent Agency Start Date</i> }.

The following automated message is generated when the Parent Agency is updated and the Parent Agency effective date is less than or equal to the placement begin date.

#### **Parent Agency Update**

Field	Required	Parameters Passed
To	Yes	Worker Name/from Street Talk ID
Cc	Yes	Worker’s Supervisor Out of Home Care Unit Worker
Subject	Yes	Placement/Parent Agency Change
Message Box	Yes	{ <i>Provider Name</i> } has had Parent Agency update. The current placement for { <i>Child Name</i> } has been ended with an effective date of { <i>placement begin date</i> }. Please verify service type and rate information and create a new placement for this child with an effective date of { <i>previous placement begin date</i> }.



**Duplicate Provider Clean-up Notification**

Field	Required	Parameters Passed
To	Yes	All open assignments to the case excluding Maximus/eligibility staff > If case has primary assignment to default worker then send message to ID-Create of OHP and that worker's supervisor
Cc	No	
Subject	Yes	Action Needed – Duplicate Provider Clean-up
Message Box	Yes	<p>Provider &lt;provider name&gt; (&lt;provider ID&gt;) has been identified as a duplicate provider record. This means all placements with this provider will need to be closed, including the placement for &lt;child's name&gt; in the &lt;case name&gt; case (&lt;case ID&gt;).</p> <p>There are two ways you can close the placement for &lt;child's name&gt; in the &lt;case name&gt; case (&lt;case ID&gt;).</p> <p>First, you may choose to close this placement yourself. If you choose this method, you will need to close the placement with the duplicate provider record anytime between now and &lt;14 calendar days from date the message is being sent&gt;. Please close it using the last day of the previous month as the end date and the end reason of "Duplicate Provider Clean Up". Then, please re-create the placement for &lt;child's name&gt; with provider record &lt;retained provider name&gt; (&lt;retained provider ID&gt;) with the first day of this month as the begin date.</p> <p>For example, let's pretend it is January 2006 and you need to close a placement for a child with duplicate Provider A and re-create it with Provider B. You would need to close the placement with Provider A as of December 31, 2005 and then re-create the placement with Provider B using January 1, 2006 as the begin date. This will minimize the likelihood of an overpayment or pro-rated payment issues. Please note that when closing the placement with the duplicate provider record it is very important to use the end reason of "Duplicate Provider Clean Up" as this will result in the system counting these 2 placements for the child as only one placement so that your templates (Court Report, Permanency Plan, etc.) pre-fill correctly and the placement stability reports for your county are accurate as well.</p> <p>The second way to have the placement close is to allow the system to automatically close it for you. If the placement for this child is still open as of &lt;14 calendar days from date the</p>

		<p>message is being sent&gt; the system will automatically close the placement for you with the correct end dates and end reason. You will still need to re-create the placement for the child with provider record &lt;retained provider name&gt; (&lt;retained provider ID&gt;) at that time. If the system closes the placement for you, you will receive an additional notification to remind you to re-create the placement when that occurs.</p> <p>If you have any questions please contact the helpdesk or &lt;name of person inactivating provider record with e-mail address</p>
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### Placements ended with 'Duplicate Provider Clean-up' End Reason

Field	Required	Parameters Passed
To	Yes	<p>All open assignments to the case excluding Maximus/eligibility staff</p> <p>&gt; If case has primary assignment to default worker then send message to ID-Create of OHP and that worker's supervisor</p>
Cc	No	
Subject	Yes	Action Needed – Duplicate Provider Clean-up
Message Box	Yes	<p>"Provider &lt;provider name&gt; (&lt;provider ID&gt;) has been closed as a duplicate provider record. As a result, all placements with this provider record have been closed with an end date of &lt;end date&gt;; including the placement for &lt;child's name&gt; in the &lt;case name&gt; case (&lt;case ID&gt;). In order for the placements and payments to continue to be documented for the child it is necessary for you to re-create the placement using the provider record of &lt;retained-provider name&gt; (&lt;retained provider ID&gt;). Please use the begin date of&lt;end date plus one day&gt; as this minimizes the likelihood of an overpayment or pro-rated payment issue. Please note that your county service types must be associated with the &lt;retained-provider name&gt; (&lt;retained provider ID&gt;) record prior to you creating the new placement. Provider record &lt;retained-provider name&gt; (&lt;retained provider ID&gt;) should be used for all placements with this provider in the future. If you have any questions please contact the helpdesk or &lt;name of person inactivating provider record, with email address&gt;."</p>

**Placements ‘Not Approved’ due to ‘Duplicate Provider Clean-up’**

Field	Required	Parameters Passed
To	Yes	Worker who created the pending OHP and that worker's supervisor
Cc	No	
Subject	Yes	Action Needed – Duplicate Provider Clean-up
Message Box	Yes	<p>Provider &lt;provider name&gt; (&lt;provider ID&gt;) has been closed as a duplicate provider record. As a result, the pending placement for &lt;child's name&gt; in the &lt;case name&gt; case (&lt;case ID&gt;) has been automatically Not Approved. In order for the placement to be documented for the child it is necessary for you to re-create the placement using the provider record of &lt;retained-provider name&gt; (&lt;retained provider ID&gt;). Please note that your county service types must be associated with the &lt;retained-provider name&gt; (&lt;retained provider ID&gt;) record prior to you creating the new placement. Provider record &lt;retained-provider name&gt; (&lt;retained provider ID&gt;) should be used for all placements with this provider in the future. If you have any questions please contact the helpdesk or &lt;name of person inactivating provider record, with email address &gt;.</p>

**Placements set as “Made In Error” since begin date is after the last day of previous month.**

Field	Required	Parameters Passed
To	Yes	Worker who created the pending OHP and that worker's supervisor
Cc	No	
Subject	Yes	Action Needed – Duplicate Provider Clean-up
Message Box	Yes	<p>The provider record for Provider &lt;provider name&gt; (&lt;provider ID&gt;) has been closed as a duplicate provider record. This means all placements with this provider have been closed, including the recent placement for &lt;child’s name&gt; in the &lt;case name&gt; case (&lt;case ID&gt;). Since the placement for &lt;child’s name&gt; was made so recently, no payments had been processed by the time the placement was closed. As a result, the placement was closed with the end reason of “Made in Error”.</p> <p>In order for the placement and future payments to be documented for this child it is necessary for you to re-create the placement using the provider record of &lt;retained provider name&gt; (&lt;retained provider id&gt;). Please use the actual begin</p>

		<p>date of the placement. Provider record &lt;retained provider name&gt; (&lt;retained provider id&gt;) should be used or all placements with this provider in the future.</p> <p>If you have any questions please contact the helpdesk or &lt;name of person inactivating the provider record, with e-mail address&gt;.</p>
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#### 1.3.4. Checklists

None

#### 1.3.5. Ticklers

##### 1.3.5.1. Review Provider EFT Information

<b>Category:</b>	Financial
<b>Type:</b>	Review Provider EFT Information
<b>Description:</b>	<p>This tickler reminds the worker with the primary provider assignment in the Designated County for the Provider to check the payment method after a pre-note has been sent. If there is no open Primary Assignment within the Provider's Designated County, then remind the worker with the latest assignment to the provider within the designated County.</p>
<b>Creation:</b>	<p>The tickler is created by WiSACWIS to DOA- EFT File Extract batch program for each pre-note sent.</p> <p>Upon creation of the tickler, a check for a County specific tickler is made. If a unique record exists for a specified County, and that County has decided to utilize this tickler, then a tickler is created with due dates, reminder dates, and escalation dates denoted in the CATEGORY_TYPE table. See CATEGORY_TYPE for County-specific tickler values.</p> <p>If a unique record exists for a specified County, and that County has decided to not use this tickler, then no tickler is created for the County. See CATEGORY_TYPE table for County-specific information.</p> <p>If a unique record does not exist for a specified County, then the base values for the tickler are utilized. The due dates, reminder dates, and escalation dates are then based on the values described below.</p>
<b>Deletion:</b>	This tickler is deleted when the Out of Home Care worker changes the Payment Method to EFT or requests another pre-note or resets the EFT Information on the Electronic Funds Transfer page.
<b>Due Date:</b>	30 days after the worker selects the Prenote Sent
<b>Reminder Date:</b>	15 days before the ticker is due.
<b>First Escalation Date:</b>	Same day the tickler is due.

**Second Escalation Date:** 5 days before due date.

#### **1.3.5.2. Inactivate Duplicate Provider**

**Category:** OHCU  
**Type:** Duplicate  
**Description:** Display it for the duplicate provider using dup provider name and ID and count down immediately- Due in 14 days down to 0 days with no escalation  
**Creation:** The tickler is created when the worker checks the Notify checkbox on the Duplicate Provider header section and successfully saves  
**Deletion:** The tickler is deleted when the worker checks the Complete checkbox on the Duplicate Provider header section and successfully saves.  
**Due Date:** 14 days from the date of creation  
**Reminder Date:** Immediately after the tickler creation condition is met it appears on the desktop  
**First Escalation Date:** N/A  
**Second Escalation Date:** N/A

#### **1.3.6. Notifications**

None

#### **1.3.7. Text Templates**

##### **1.3.7.1. Foster Family Support Plan Eval/Revision**

The Foster Family Support Plan Eval/Revision is a text template that records the evaluation or revision for support service areas of the Foster Family. Only those templates created prior to October 2004 can be accessed via the Options drop down box on the Home Tab of the Home Provider Page. *(Foster Family Support Plan/Eval Revision templates created after this date are accessed via the Forms page.)*

##### **1.3.7.2. Foster Family Support Plan**

The Foster Family Support Plan is a text template that records the support service areas of the Foster Family. This template is accessed by selecting Foster Family Support Plan from the Support Plans drop down on the Create Case Work page. Only those templates created prior to October 2004 can be accessed via the Options drop down box on the Home Tab of the Home Provider Page. *(Foster Family Support Plan/Eval Revision templates created after this date are accessed via the Forms page.)*

##### **1.3.7.3. Adoptive Family Support Plan**

The Adoptive Family Support Plan is a text template that records the support service areas of the Adoptive Family. This template is accessed via the Options drop down box on the Home Tab of the Home Provider Page.

**1.3.7.4. Family Fact Sheet**

The Family Fact Sheet is a text template that records information about the Foster Family. This template is accessed via the Options drop down box on the Home Tab of the Home Provider Page.

**1.3.7.5. Foster Parent Notice – Confidentiality of Records**

The Foster Parent Notice – Confidentiality of Records is an agreement between the agency and the home provider regarding the process of maintaining confidentiality of foster children in care. This template is accessed via the Options drop down box on the Home Tab of the Home Provider Page.

**1.3.7.6. Training Letter**

The Training Letter is a text template that can be used to inform the Foster Family of upcoming training events. This template is accessed via the Options drop down box on the Training Tab of the Home Provider Page.

**1.3.8. Reports****1.3.8.1. Birthday Program Report - WiSACWIS Age Changes**

The Birthday Program Report lists the number of children that change ages from one service type category to the next or age out of the system. The report is run monthly. The report can be run by County, or for All Counties.

**1.3.8.2. Quarterly Statistics**

This report counts Providers by various Provider characteristics and Children by various Child characteristics. The report is run monthly.

**1.3.8.3. Monthly Application Statistics**

For each supervisor, this report lists the workers names and counts of all applications with activity during the requested month by the specified criteria for each worker. The report is run monthly.

**1.3.8.4. Monthly Licensing Activities**

For each Supervisor, this report lists the workers and their providers by application or License Status and Provider Type. The report includes Provider Name, Provider ID, Provider Address, Phone number, License Type, License capacity, Date Application was made or License became effective and Date License expires. The report is run monthly.

**1.3.8.5. Adoption Monthly Statistics**

This report counts occurrences for various criteria in the Adoptive Home, Inquiry, Recruitment, Education, and Assessment area and Adoption Provider Management.

**1.3.8.6. Foster Homes by Worker and Status**

Lists Foster Homes by Status for each Worker. The report can be run by County, or for All Counties.

**1.3.8.7. Foster Home Activity by Worker**

List foster homes by workers and the number of days to complete the assessment from worker assignment to completed assessment. The report can be run by County, or for All Counties.

**1.3.8.8. Foster Home Counts and Vacancy Rates**

List foster homes by worker and the number of licensed beds, beds available and the percentage of unused beds. The report can be run by County, or for All Counties.

**1.3.8.9. Foster Home – Expiring Licenses**

Lists all Foster Homes whose license will expire within the next 90 days, for each Worker. Includes Adoptive Homes licensed as Foster Homes.

**1.3.8.10. BMCW Monthly Expiring Non-CHIPS Kinship**

Kinship Care cases must be reassessed annually. This report provides a list of non-CHIPS kinship providers due for assessment.

**1.3.8.11. Adoptive Homes Approved and Available for Placements**

This report lists Adoptive Homes with an Approved Status without a Placement by the Region.

**1.3.8.12. Open Home Assessments – Elapsed Time to Complete**

Shows the elapsed time, in months from the Application Date, for each open Home Assessment.

**1.3.8.13. Home Assessments Completed – Elapsed Time to Complete**

Shows the elapsed time, in days, for all Home Assessments for each Worker, each Region, and Statewide.

**1.3.9. Triggers****1.3.9.1. Trigger Txn Code 6100**

Created if the Effective Start Date (on the Provider Service Rate page) < the Date Last Paid on the Service Type table for that particular CD\_SRVC. This Trigger is processed by the Calculate Ongoing Amounts batch (*FM01: Issue/Reconcile Checks*).

The 6100 trigger is produced when a rate change occurs for a provider or service. When a rate change occurs, the Calculation Ongoing batch will retrieve this trigger and post either a negative or positive payment adjustment, to compensate for past payments that were issued at the previous rate level.

### **1.3.9.2. Trigger Txn Code 51**

When a new PRVD\_ELIG\_COST record is inserted WHERE PRVD\_ELIG\_COST.dt\_eff <= current system date, then insert a record in the ONLINE\_TRIGGER table and set the following attributes.  
ONLINE\_TRIGGER.cd\_txn = 51. ONLINE\_TRIGGER.id\_cr = log-in ID of the worker  
ONLINE\_TRIGGER.ts\_cr = Current system date.  
ONLINE\_TRIGGER.ts\_efct\_frm = PRVD\_ELIG\_COST.dt\_eff.  
ONLINE\_TRIGGER.id\_trigger1 RVD\_ELIG\_COST.id\_prvd\_org. Set all other fields to NULL.



## 1.4. Batch Programs

### 1.4.1. Birthday Batch

**Program Name:** b-pm02-birthday.cbl

**Script Name:** b-pm02a00.script

**Process Summary:** This program maintains and reports on eWiSACWIS data that relates to age of child in care. When children in placement turn 5, 12 or 15 years old, they move from one service code to another for certain kinds of care. This program moves the placement from one service code to another. For placements for which a contracted maintenance rate has been recorded on the Rate Setting page, the exceptional amount of the new placement will be reduced by an amount equal to the increase in the basic rate resulting from the service type change. The exceptional amount will be reduced to zero if the contracted amount is less than the sum of the new basic rate and supplemental amount\*. This change ensures that, for placements with contracted amounts, for the months following the child's birthday month, the monthly maintenance amount (sum of basic, exceptional and supplemental amounts) is not changed- after the child turns 5, 12 or 15 years old. Note that, because of the proration formula used in WiSACWIS, the month in which the child's birthday occurs may still have an overpayment or underpayments. It must run before eWiSACWIS generates payments to affected providers, so it is pre-requisite for every Initial Calculation run of the job "Calculate Ongoing Amount Due" specified under topic *FM01: Process Payments*. This program looks at birthdays in the past month and produces a report to help the staff manage placements for their homes. Additionally, the fully approved Foster Care Rate Setting with the type of "Birthday Update" can be created by the birthday batch when a child moves to the new age group service category and there is an approved FCRS associated with the child. The effective date on a newly created FCRS will be the same as the new episode begin date or the child birth day. If there is an existing FCRS for the child, the batch will generate a new age appropriate FCRS if the provider ids on the existing FCRS and the currently open placement coincide. If the provider ids are different, the FCRS will not be created by the batch. The birthday batch will copy the available information on the supplemental points and amounts from the Episode table, the detail on questions and answers from the Rate setting table and the narrative from the narrative\_doc table. If the contracted amount is present, the batch will recalculate the exceptional amount on a new FCRS. The user assigned to the case will be able to launch the CFS-834 Foster Care Uniform Rate Setting template from the outliner to update

the template once. After the user saves the changes and closes the page the template will freeze.

The birthday batch will create a new FCRS even in situations when the child's placement was closed during the month of a child's birthday if all the conditions for creating the FCRS are met.

**Frequency:** Monthly

**Dependencies:** None

**Input Parameters:** pm02a00-parameter  
Job Name  
Creation Date  
Sequence Number  
Process All Flag  
Run Month/Year  
Service type code - up to 4 can be entered

**Input Files:** cycle-date-override

**Output Files:** pm02a00-report  
pm02a00-birthday (used in a subsequent job step to create a Syncsort report called pm02a00a-report)

<b>Database Tables:</b>	APPROVAL	R, I
	ASSIGNMENT	R
	BIRTHDAY	R
	DOC_NARRATIVE	R, I
	EPISODE	R, I, U
	LOCATION	R
	PERSON	R
	PROVIDER_ORG	R, U
	PROVIDER_PART	R
	PROVIDER_SERVICE	R, U
	RATE_SETTING	R, I
	SERVICE_TYPE	R
	SERVICE_RATE	R
	WORKER	R

- This program does not process placements that have Episode.fl\_corrected = 'Y'. These are placements that have been either corrected by or inserted through via the Placement Correction functionality.
- The placement ending purpose (Episode.cd\_ending\_purpose) is populated, whenever an OOH placement is ended by this batch program. The program uses Code\_Desc.tx\_desc\_med

where Code\_Desc.id\_grp=' EPSPLED' and Code\_Desc.id\_grpi = 'Birthday' code value to determine the ending purpose associated with the 'Birthday' end reason.

- The new placement inserted by this batch program should include the following new fields:

-If the original placement was open at the time this batch ran:

- Episode.cd\_ending\_purpose: Null.
- Episode.tx\_prvd\_nm: Same value as Episode.tx\_prvd\_nm in the original placement.
- Episode.fl\_corrected: Same value as Episode.fl\_corrected in the original placement.
- Episode.dt\_trans\_dsch: Null.

-If the original placement was ended at the time this batch ran:

- Episode.cd\_ending\_purpose: Same value as the Episode.cd\_ending\_purpose in the original placement.
- Episode.tx\_prvd\_nm: Same value as Episode.tx\_prvd\_nm in the original placement.
- Episode.fl\_corrected: Same value as Episode.fl\_corrected in the original placement.
- Episode.dt\_trans\_dsch: same value as the Episode.fl\_trans\_dsch in the original placement.
- Episode.dt\_trans\_dsch should be set to null on the original placement.

- The batch creates a new FCRS when there is an existing row in the rate\_setting table and the status of the rate setting is approved. approval.cd.stat = 'A'
- The batch will match the provider id on the Episode with the id on the Rate\_Setting. No rate setting will be created if they do not match.
- If several rows exist for the same child/provider, the system will skip the record, and no rate setting will be created

- When a Rate Setting is ended by this program, the following processes will occur:

- Set RATE\_SETTING.dt\_end = {Child's date of birth – 1 day} (or new dt\_efctv – 1 day)
- Set RATE\_SETTING.cd\_end\_rsn = value for Birthday Batch (2)
- Insert Approval rows for RATE\_SETTING ending:
  - ID\_WRK\_TYPE = RATE\_SETTINGo.id\_rate\_setting
  - CD\_WRK\_TYPE = 62
  - APPROVAL.cd\_actn = 'A', APPROVAL.cd\_stat = 'A'
  - APPROVAL.id\_prsn = Batch ID

- The new rate setting inserted by this batch program will include the following new fields:

If the original placement and FCRS were open at the time this batch ran:

- RATE\_SETTING.dt\_efctv: {existing logic}. (child's date of birth)
- RATE\_SETTING.dt\_end: Null.

If the original placement and/or FCRS was ended at the time this batch ran:

- RATE\_SETTING.dt\_efctv: {existing logic}. (child's date of birth)
- RATE\_SETTING.dt\_end: End date of placement / FCRS.

- RATE\_SETTING.id\_cr: Batch ID

NewBasicRate = Service\_Rate.am\_rate

where Service\_Rate.cd\_srvc = Episode.cd\_srvc and Service\_Type.fl\_prvd\_rate = 'N'  
and Service\_Rate.dt\_efct\_strt <= RATE\_SETTING.dt\_efctv  
and Service\_Rate.ts\_cr =  
    (max(Service\_Rate.ts\_cr) where Service\_Rate.cd\_srvc = Episode.cd\_srvc  
    and Service\_Type.fl\_prvd\_rate = 'N'  
    and Service\_Rate.dt\_efct\_strt <= RATE\_SETTING.dt\_efctv)

OldBasicRate = Service\_Rate.am\_rate

where Service\_Rate.cd\_srvc = Episode.cd\_srvc and Service\_Type.fl\_prvd\_rate = 'N'  
and Service\_Rate.dt\_efct\_strt < RATE\_SETTING.dt\_efctv  
and Service\_Rate.ts\_cr =  
    (max(Service\_Rate.ts\_cr) where Service\_Rate.cd\_srvc = Episode.cd\_srvc  
    and Service\_Type.fl\_prvd\_rate = 'N'  
    and Service\_Rate.dt\_efct\_strt < RATE\_SETTING.dt\_efctv)

- If OldFCRS.am\_contracted = 0 (no contracted amount is recorded) process copying, but do not adjust exceptional amount: NewFCRS.am\_excpt = OldFCRS.am\_excpt. (The new rate setting total will be greater than the old rate setting total).
- If OldFCRS.am\_contracted is greater than the sum of OldFCRS.am\_supplmnt and NewBasicRate, then:
  - NewFCRS.am\_excpt = OldFCRS.am\_contracted - OldFCRS.am\_supplmnt – NewBasicRate
- If OldFCRS.am\_contracted is less than the sum of OldFCRS.am\_supplmnt and NewBasicRate and OldFCRS.am\_contracted is not zero, then:
  - NewFCRS.am\_excpt = zero
- NewFCRS.am\_contracted = OldFCRS.am\_contracted

In the “pm02a00-birthday” file generated by the batch, add a new column for the change in exceptional amount.

Change in exceptional amount = NewEpisode.am\_excpt – OldEpisode.am\_excpt

- The new rate setting inserted by this batch program will include the following new fields:  
If the original placement and FCRS were open at the time this batch ran:
  - RATE\_SETTING.dt\_efctv = Child’s date of birth.
  - RATE\_SETTING.dt\_end: Null.

If the original placement and/or FCRS was ended at the time this batch ran:

- RATE\_SETTING.dt\_efctv: Child’s date of birth
- RATE\_SETTING.dt\_end: End date of placement / original FCRS.

**1.4.2.**

### **UFCR Transition Batch**

**Program Name:** b-pm02a02-ufcr-transition.cbl

**Script Name:** b-pm02a02.script

**Process Summary:** This program updates eWiSACWIS data related to Foster Care Rate Settings which are in effect, for a child in care, when a change occurs to the Uniform Foster Care Rates. This program does not move the placement from one service code to another, but rather creates a new Foster Care Rate Setting with adjusted rates, based on the new UFCR basic rates. For placements for which ~~an exceptional~~ a contracted rate has been recorded on the Rate Setting page, the exceptional amount of the new placement will be reduced by an amount equal to the increase in the basic rate resulting from the UFCR rate change. The exceptional amount will be reduced to zero if the contracted amount is greater than zero, but is less than the sum of the new basic rate and supplemental amount. This ensures that, for placements with contracted amounts, for the months following the UFCR change, the monthly maintenance amount (sum of basic, exceptional and supplemental amounts) is not changed.

If there is an existing FCRS for the child, the batch will generate a new appropriate FCRS if the provider IDs on the existing FCRS and the currently open placement match. If the provider IDs are different, the FCRS will not be created by the batch. The effective date on a newly created FCRS will be control card specified.

This batch will create a new FCRS even in situations when the child's placement was closed during the month of a UFCR change if the placement ending occurred after the UFCR effective date. If the placement was ended on or after the UFCR effective date the batch will back-date the previous rate setting end to the control card termination date and create a new rate setting with the specified effective date, as well as end the new rate setting corresponding to the placement end date.

The batch will copy the available information on the supplemental points and amounts and the detail on questions and answers from the Rate Setting table and the narrative from the doc\_ narrative table. The user assigned to the case will be able to launch the CFS-834 Foster Care Uniform Rate Setting template from the outliner to update the template once. After the user saves the changes and closes the page the template will freeze.

Note that because this batch will only make Foster Care Rate Settings effective on the first day of the control card specified month, there should be no prorating issues related to mid-month Rate Settings. In the event of a UFCR change, this batch must become the final program in the Monthly

Financial 1 job cycle and should be run in the effective month of the UFCR change. (potentially could be part of MF2, but run some risks with delaying). A critical prerequisite to this batch running is the entry of the new UFCR Basic Rates using the online application functionality.

**Frequency:** As needed

**Dependencies:** 1) Completion of the final financial cycle for a given calendar year period of service.  
2) Entry of new UFCR Basic rates via online application.

**Input Parameters:** pm02a02-parameter  
Job Name  
Creation Date  
Sequence Number  
Process All Flag  
Termination Month/Day/Year  
Effective date Month/Day/Year

**Input Files:** cycle-date-override

**Output Files:** pm02a02-report  
pm02a02-UFCR

<b>Database Tables:</b>	APPROVAL	R, I
	ASSIGNMENT	R
	DOC_NARRATIVE	R, I
	EPISODE	R, U
	LOCATION	R
	PERSON	R
	PROVIDER_ORG	R
	RATE_SETTING	R, I
	SERVICE_TYPE	R
	SERVICE_RATE	R
	WORKER	R

- This program does not process placements that have EPISODE.fl\_corrected = 'Y'. These are placements that have been either corrected by or inserted through via the Placement Correction functionality and should not have an associated Foster Care Rate Setting.
- The batch creates a new FCRS when there is an existing row in the RATE\_SETTING table and the status of that rate setting is fully approved, APPROVAL.cd.stat = 'A', and RATE\_SETTING.dt\_end is null. Or RATE\_SETTING.dt\_end >= {Control Card parameter: Effective Date} and the rate setting ending is fully approved.

- If several rows exist where the above are true, do not process and write to log file “Multiple FCRS rows for child {id\_prsn}, case {id\_case}. Records skipped without creation of new FCRS.”
- The batch will match the provider ID on the currently open Episode with the ID on the current Rate\_Setting. No rate setting will be created if they do not match.
  - If the above is true, do not process and write to log file “FCRS provider ID mismatch for child {id\_prsn}, case {id\_case}. Records skipped without creation of new FCRS.”
- When a Rate Setting is ended by this program, the following processes will occur:
  - Set RATE\_SETTING.dt\_end = {Control Card parameter: Termination Date}
  - Set RATE\_SETTING.cd\_end\_rsn = value for UFCR Change (3)
  - Insert Approval rows for RATE\_SETTING ending:
    - ID\_WRK\_TYPE = RATE\_SETTINGO.id\_rate\_setting
    - CD\_WRK\_TYPE = 62
    - APPROVAL.cd\_actn = ‘A’, APPROVAL.cd\_stat = ‘A’
    - APPROVAL.id\_prsn = Batch ID 5201
- The new rate setting inserted by this batch program will include the following new fields:  
If the original placement and FCRS were open at the time this batch ran:
  - RATE\_SETTING.dt\_efctv: {Control Card parameter: Effective Date} (assumed to be Jan 1, 20xx).
  - RATE\_SETTING.dt\_end: Null.
  - RATE\_SETTING.id\_cr: Batch ID 5201  
If the original placement and/or FCRS was ended at the time this batch ran:
  - RATE\_SETTING.dt\_efctv: Control card specified date (assumed to be Jan 1, 20xx).
  - RATE\_SETTING.dt\_end: End date of placement / FCRS.
  - RATE\_SETTING.id\_cr: Batch ID 5201

The adjusted rates to use for the new FCRS will be calculated as follows:

NewBasicRate = Service\_Rate.am\_rate  
where Service\_Rate.cd\_srvc = Episode.cd\_srvc and Service\_Type.fl\_prvd\_rate =  
‘N’  
and Service\_Rate.dt\_efct\_strt <= {Control Card parameter: Effective Date}  
and Service\_Rate.ts\_cr =  
(max(Service\_Rate.ts\_cr) where Service\_Rate.cd\_srvc = Episode.cd\_srvc  
and Service\_Type.fl\_prvd\_rate = ‘N’  
and Service\_Rate.dt\_efct\_strt <= {Control Card parameter: Effective  
Date})



OldBasicRate = Service\_Rate.am\_rate  
where Service\_Rate.cd\_srvc = Episode.cd\_srvc and Service\_Type.fl\_prvd\_rate =  
‘N’  
and Service\_Rate.dt\_efct\_strt < {Control Card parameter: Effective Date}  
and Service\_Rate.ts\_cr =  
    (max(Service\_Rate.ts\_cr) where Service\_Rate.cd\_srvc = Episode.cd\_srvc  
    and Service\_Type.fl\_prvd\_rate = ‘N’  
    and Service\_Rate.dt\_efct\_strt < {Control Card parameter: Effective  
    Date}))

- If OldFCRS.am\_contracted = 0 (no contracted amount is recorded) process copying, but do not adjust exceptional amount: NewFCRS.am\_excpt = OldFCRS.am\_excpt. (The new rate setting total will be greater than the old rate setting total).
- If OldFCRS.am\_contracted is greater than the sum of OldFCRS.am\_supplmnt and NewBasicRate, then:
  - NewFCRS.am\_excpt = OldFCRS.am\_contracted - OldFCRS.am\_supplmnt – NewBasicRate
- If OldFCRS.am\_contracted is less than the sum of OldFCRS.am\_supplmnt and NewBasicRate and OldFCRS.am\_contracted is not zero, then:
  - NewFCRS.am\_excpt = zero
- NewFCRS.am\_contracted = OldFCRS.am\_contracted

In the “pm02a01-UFCR” file generated by the batch, include a column for the change in exceptional amount.

- Change in exceptional amount = NewFCRS.am\_excpt – OldFCRS.am\_excpt.

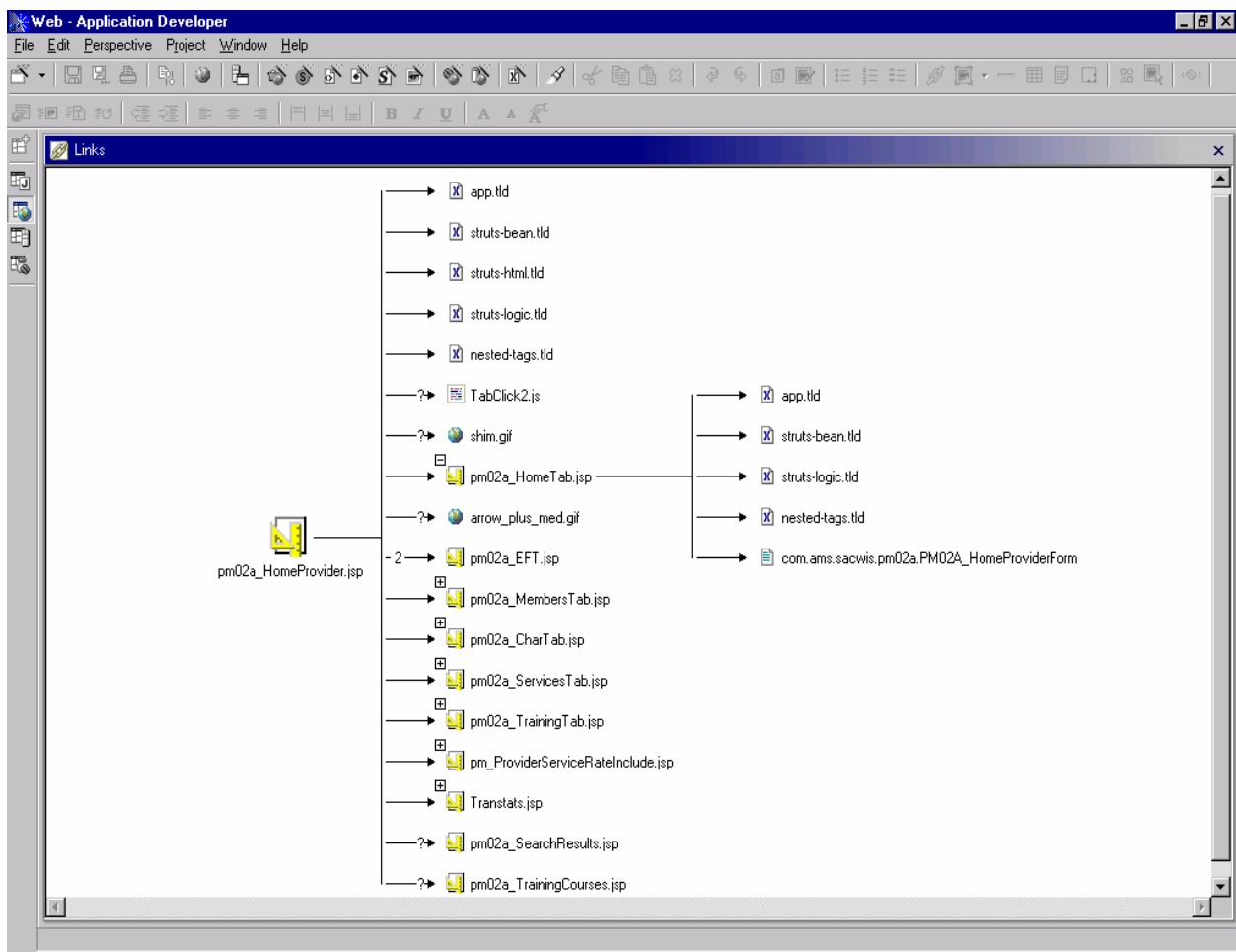
## Online Component

### 1.4.3. User Interface Components

There is one primary JSP for the PM02a (Home Provider) topic; pm02a\_HomeProvider.jsp. There are a lot of other JSPs that were created as “includes” for each tab. This was done because of the size of the page, so that the “Branch Too Large” error (64K size limit) is eliminated. There are also other support JSPs which are used primarily to move the data back and forth.

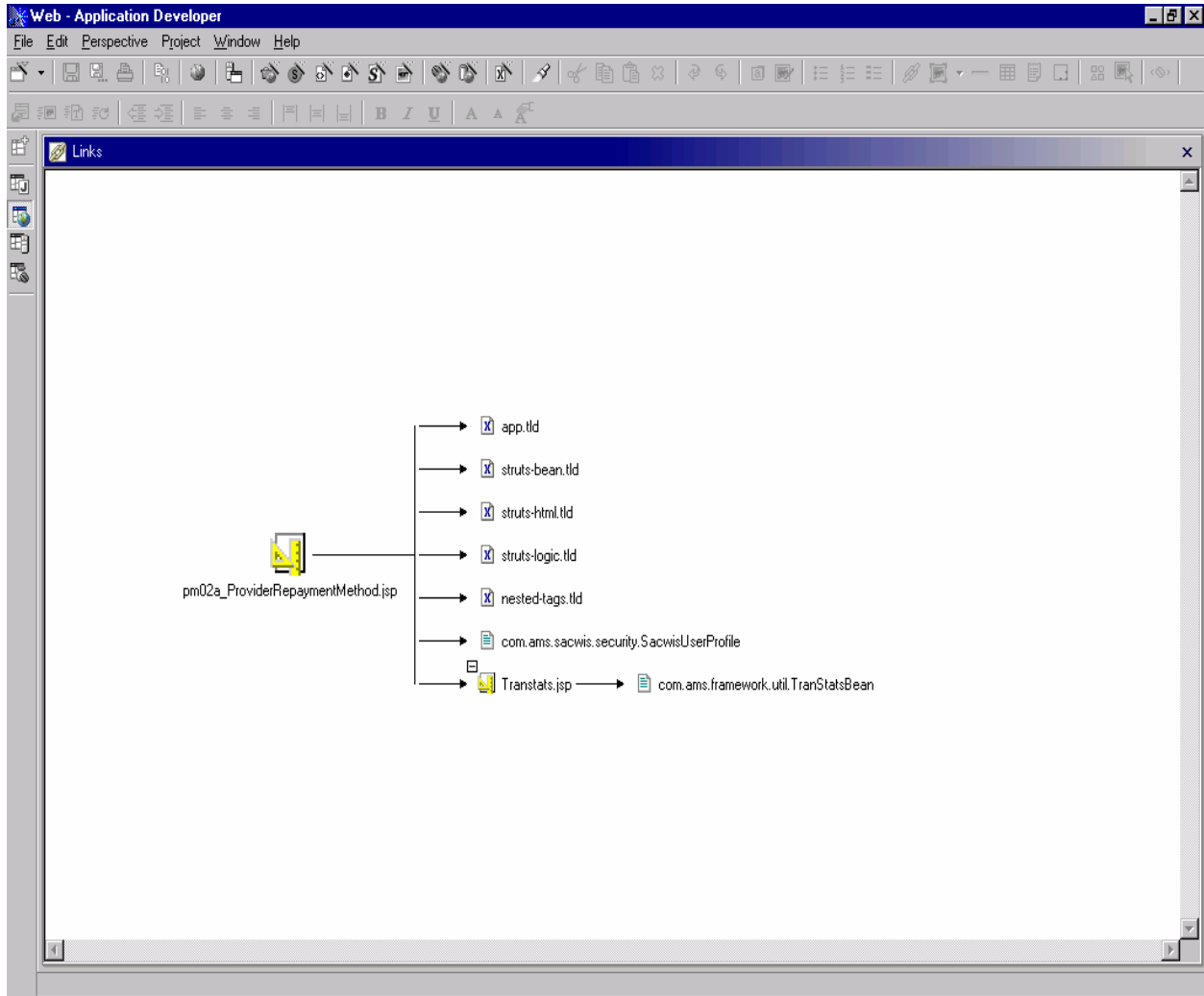
Below is the link diagram of the Home Provider page.

#### **pm02a\_HomeProvider.jsp**



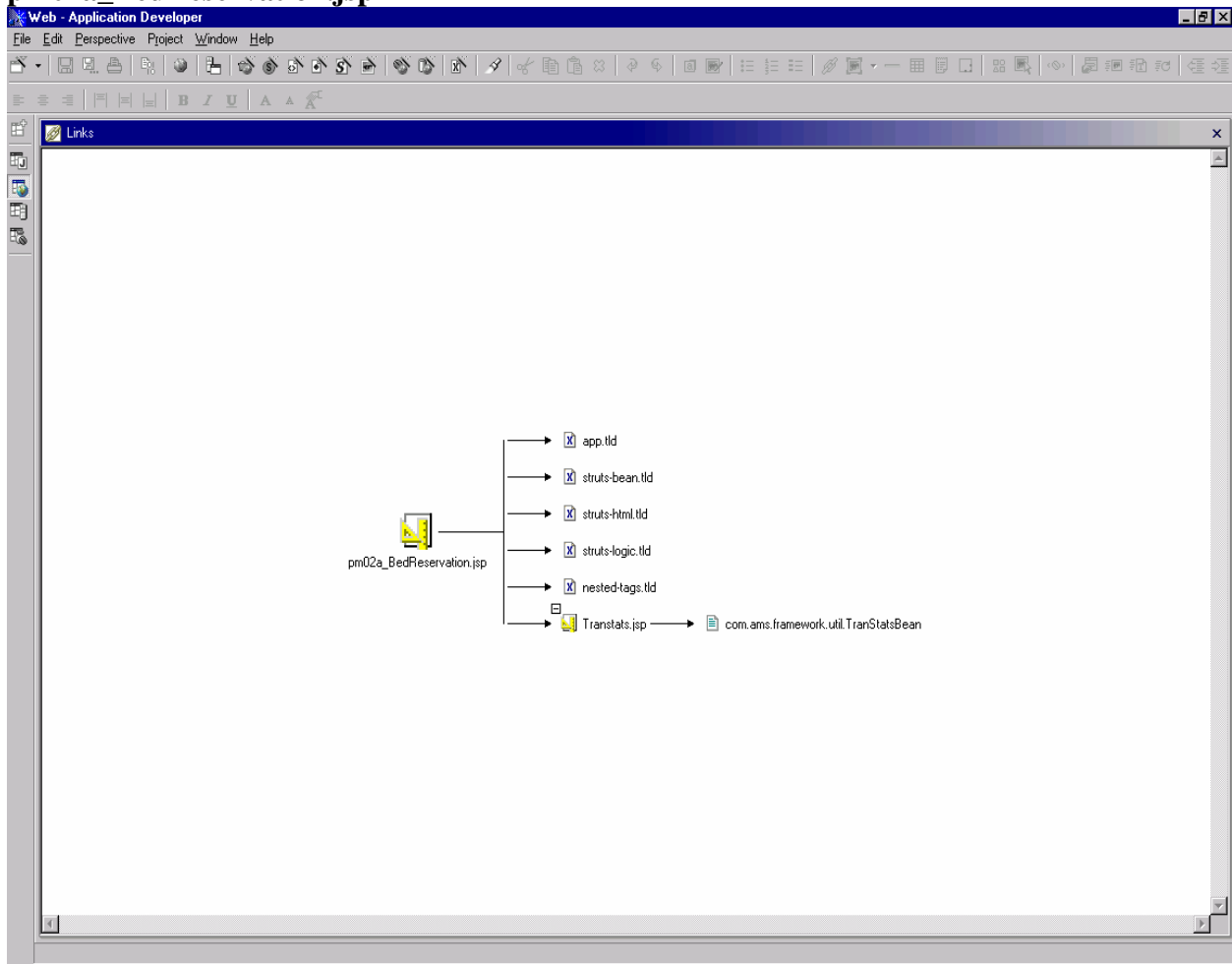
Link Diagram for Provider Repayment page.

### pm02a\_ProviderRepaymentMethod.jsp



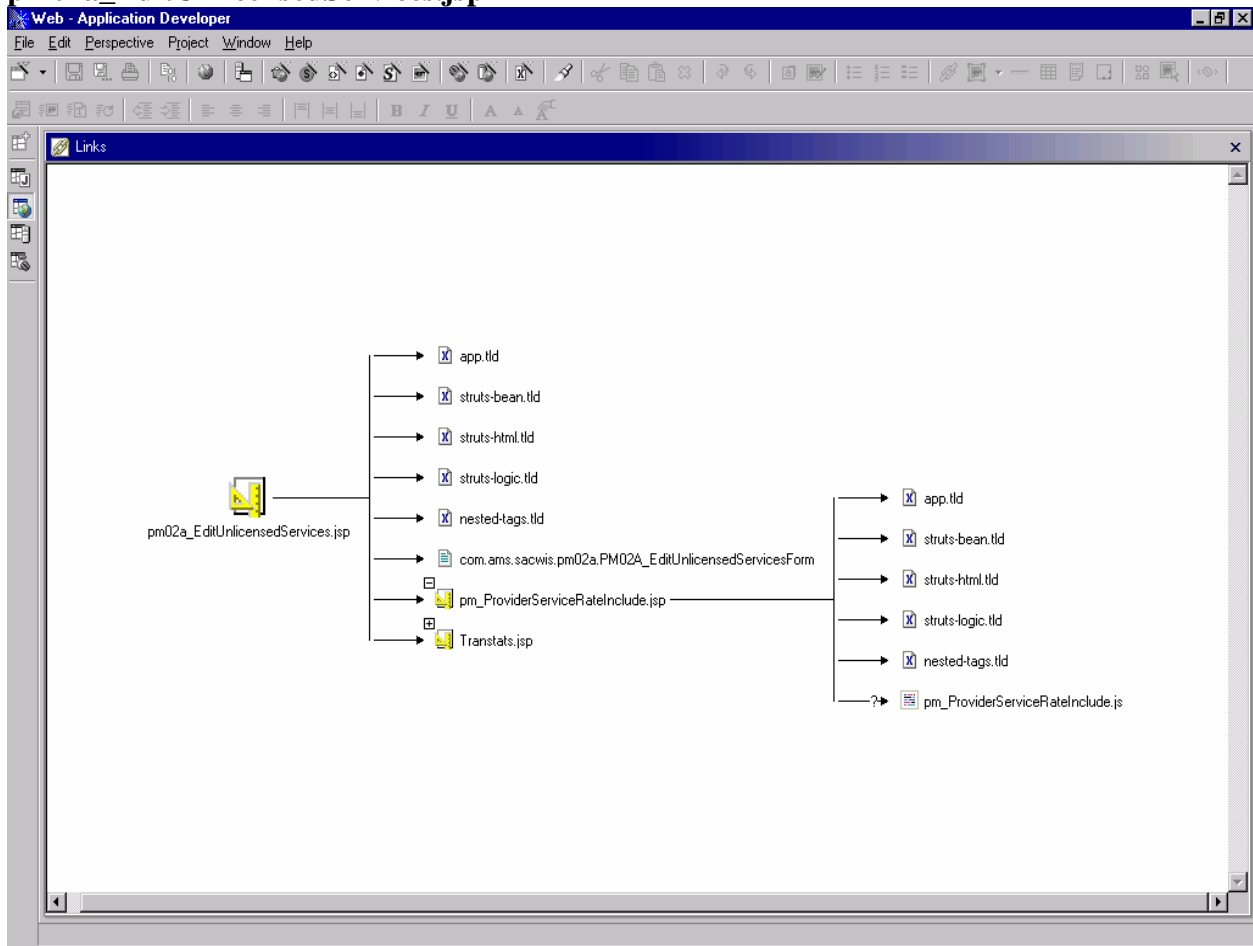
Link Diagram for Bed Reservation page.

### pm02a\_BedReservation.jsp



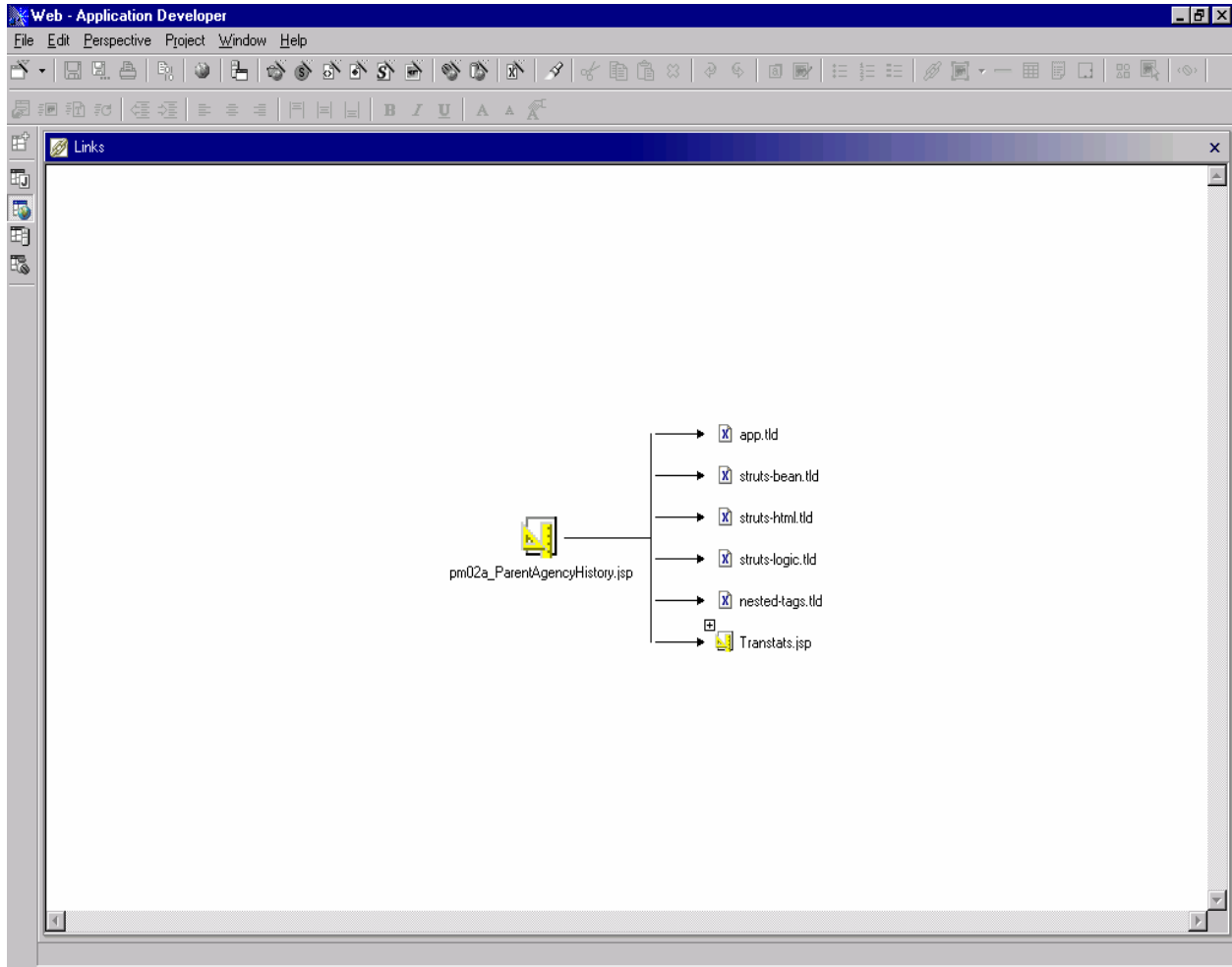
Link Diagram for Edit Unlicensed Services page.

### pm02a\_EditUnlicensedServices.jsp



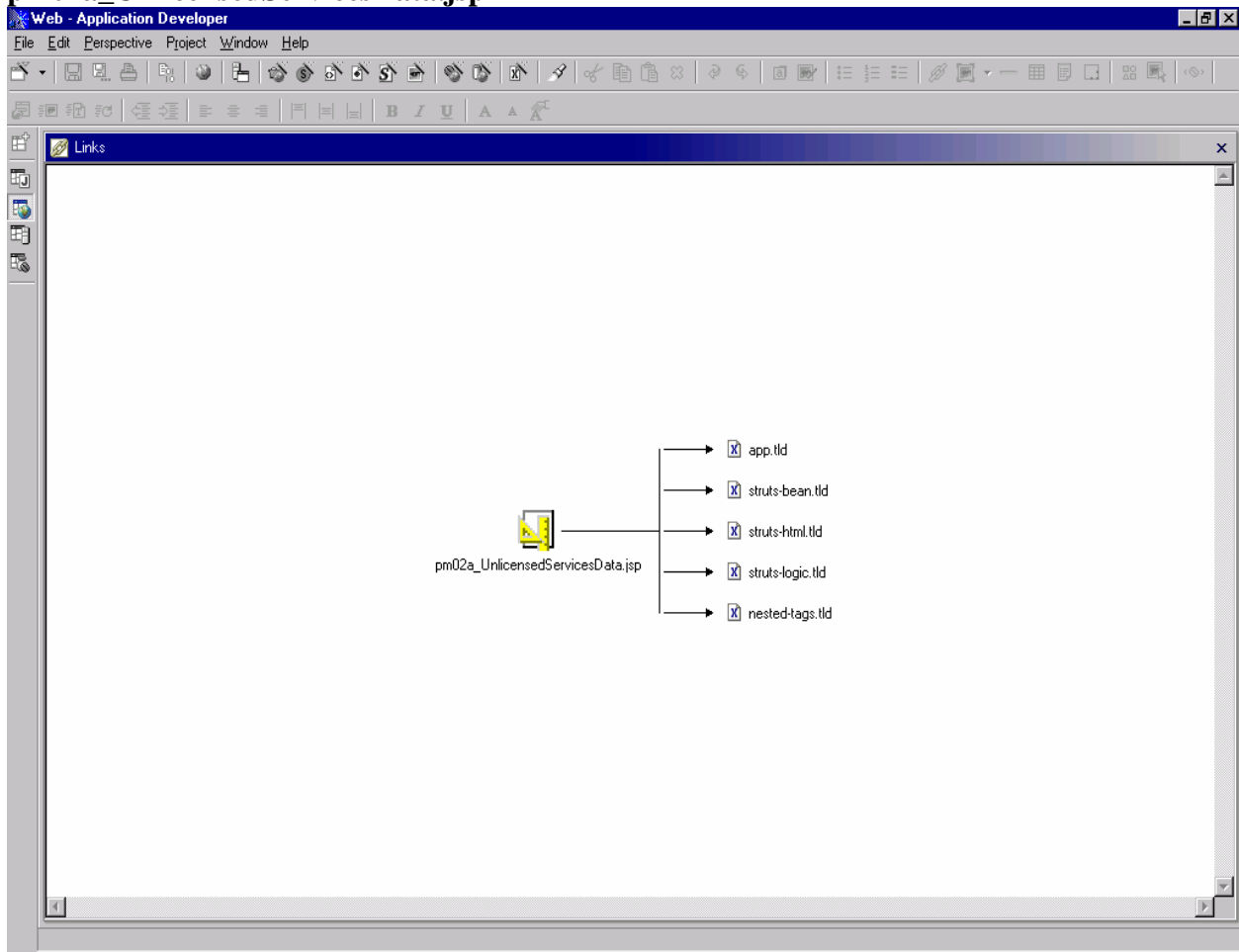
Link Diagram for Parent Agency History page.

### **pm02a\_ParentAgencyHistory.jsp**



Link Diagram for Unlicensed Services Data page (support page).

### pm02a\_UnlicensedServicesData.jsp

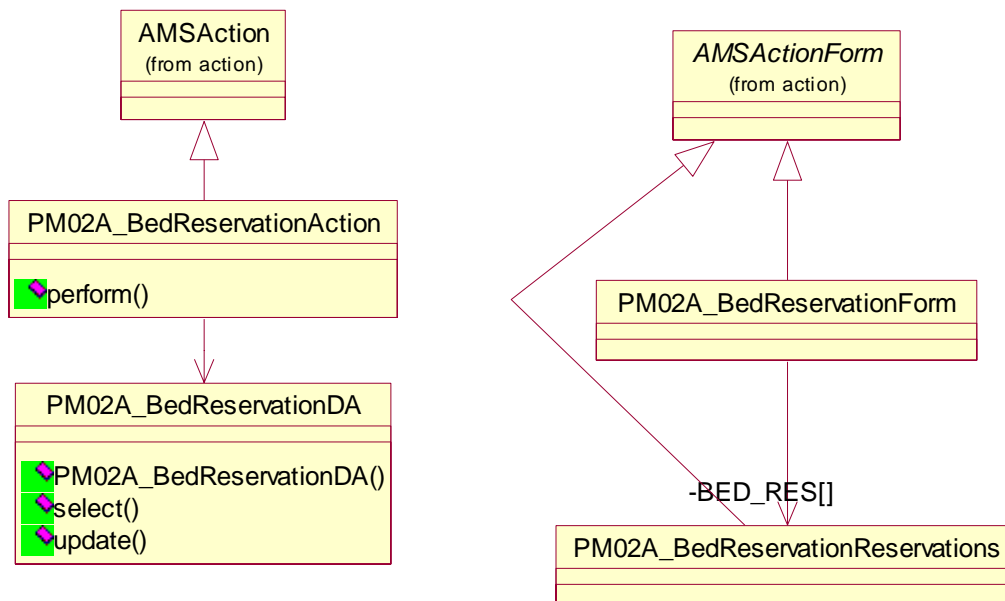


#### 1.4.4.

## Java Components

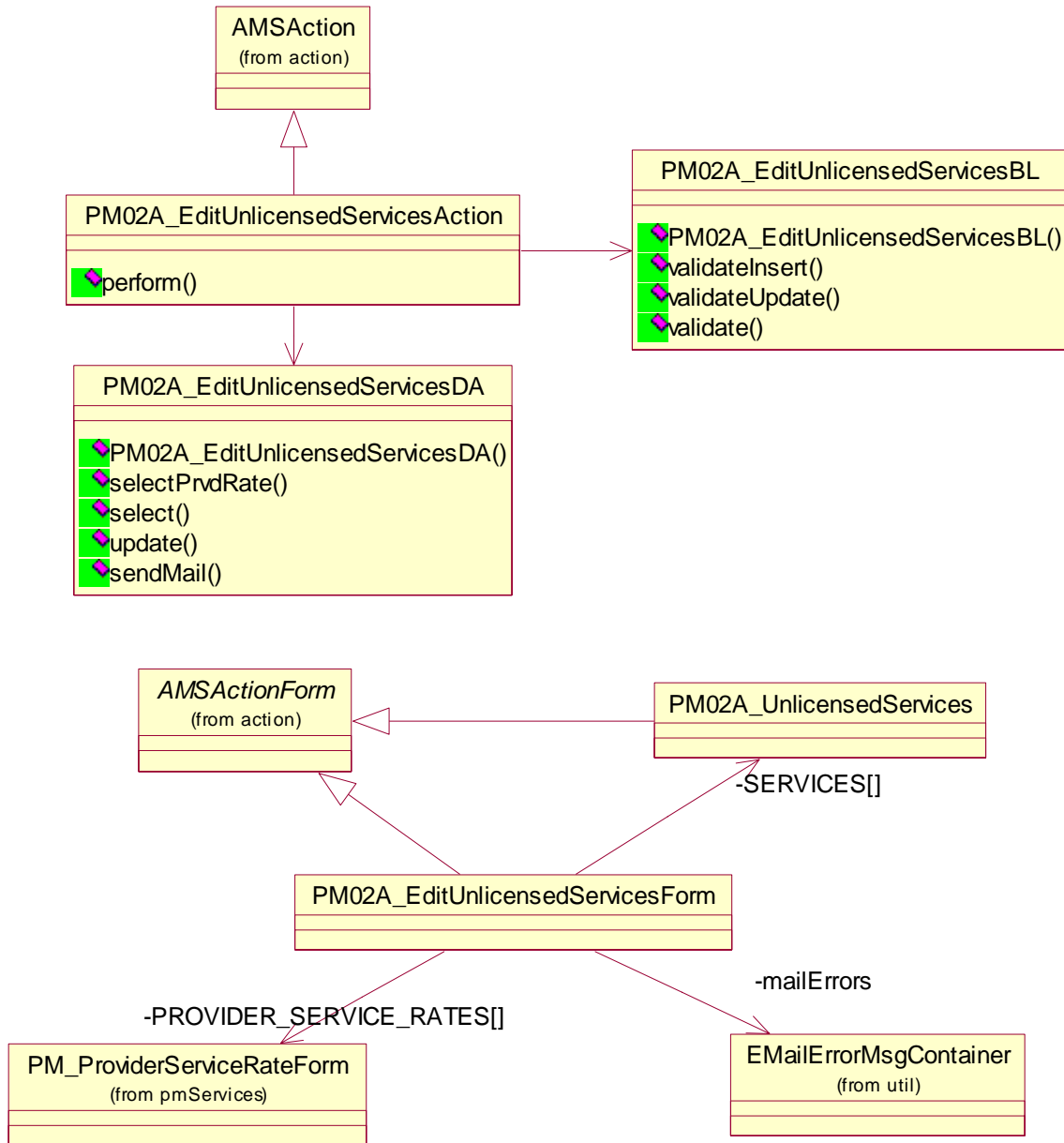
Below is the Class diagram for the PM02A (Home Provider) topic. There are five distinct “families”. One services all the Home Provider transactions, one services all the Unlicensed Services editing transactions and the other three service the transactions for the Member Status, Bed Reservation and Provider Repayment.

Main Classes involved in Bed Reservation transactions.

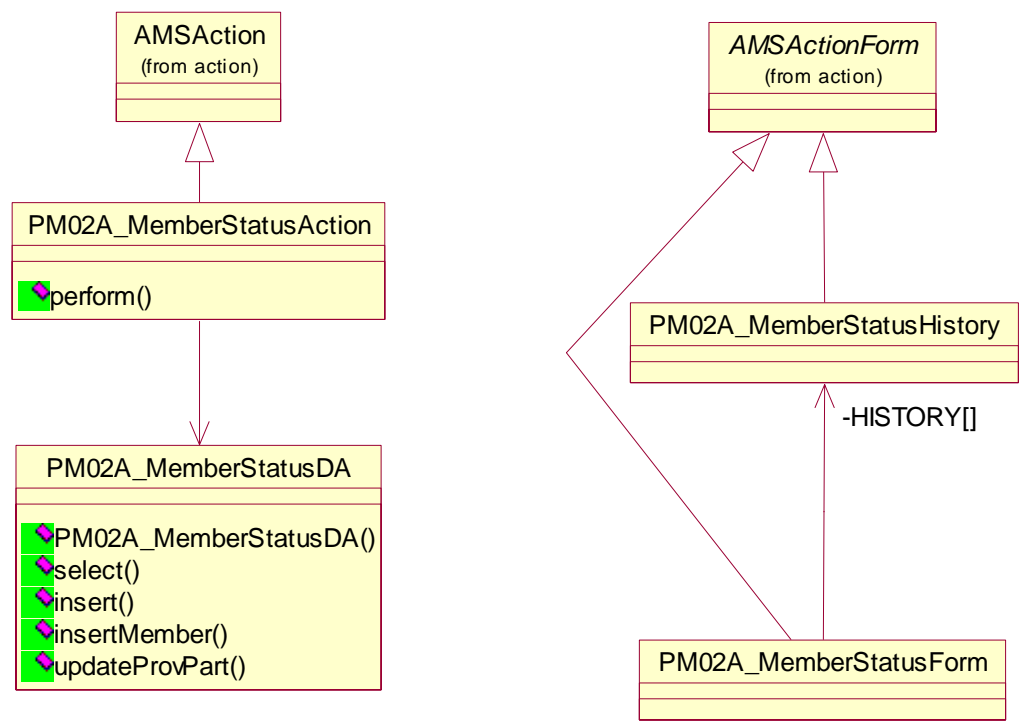




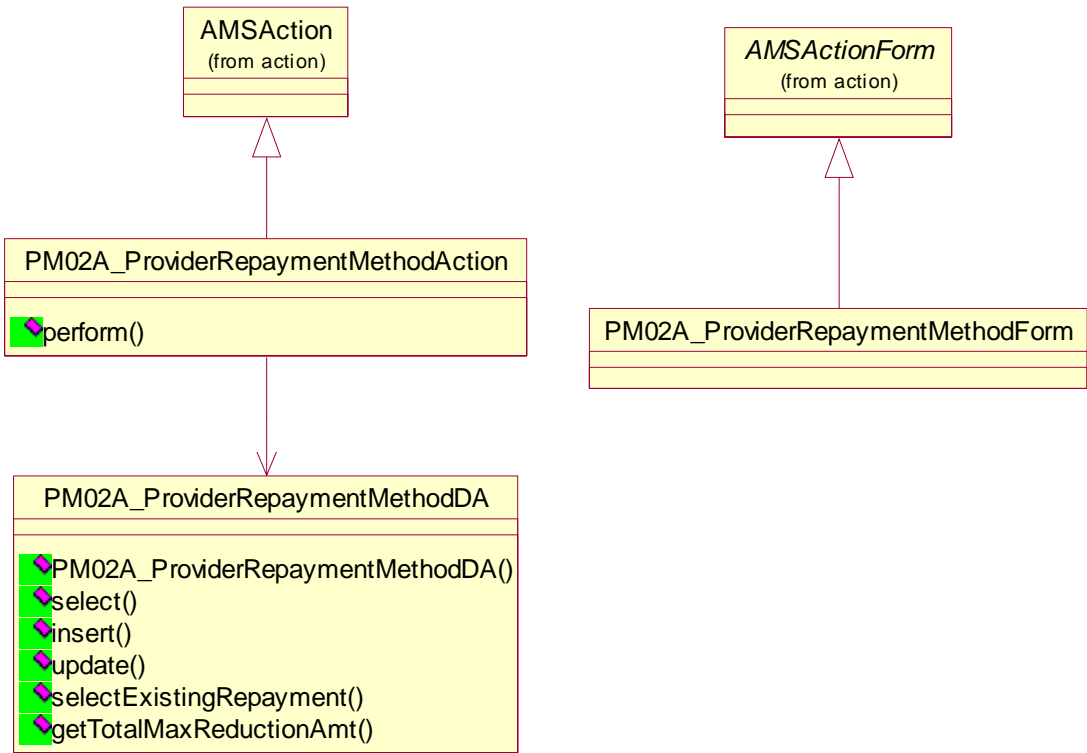
## Main Classes involved in Editing Unlicensed Services.



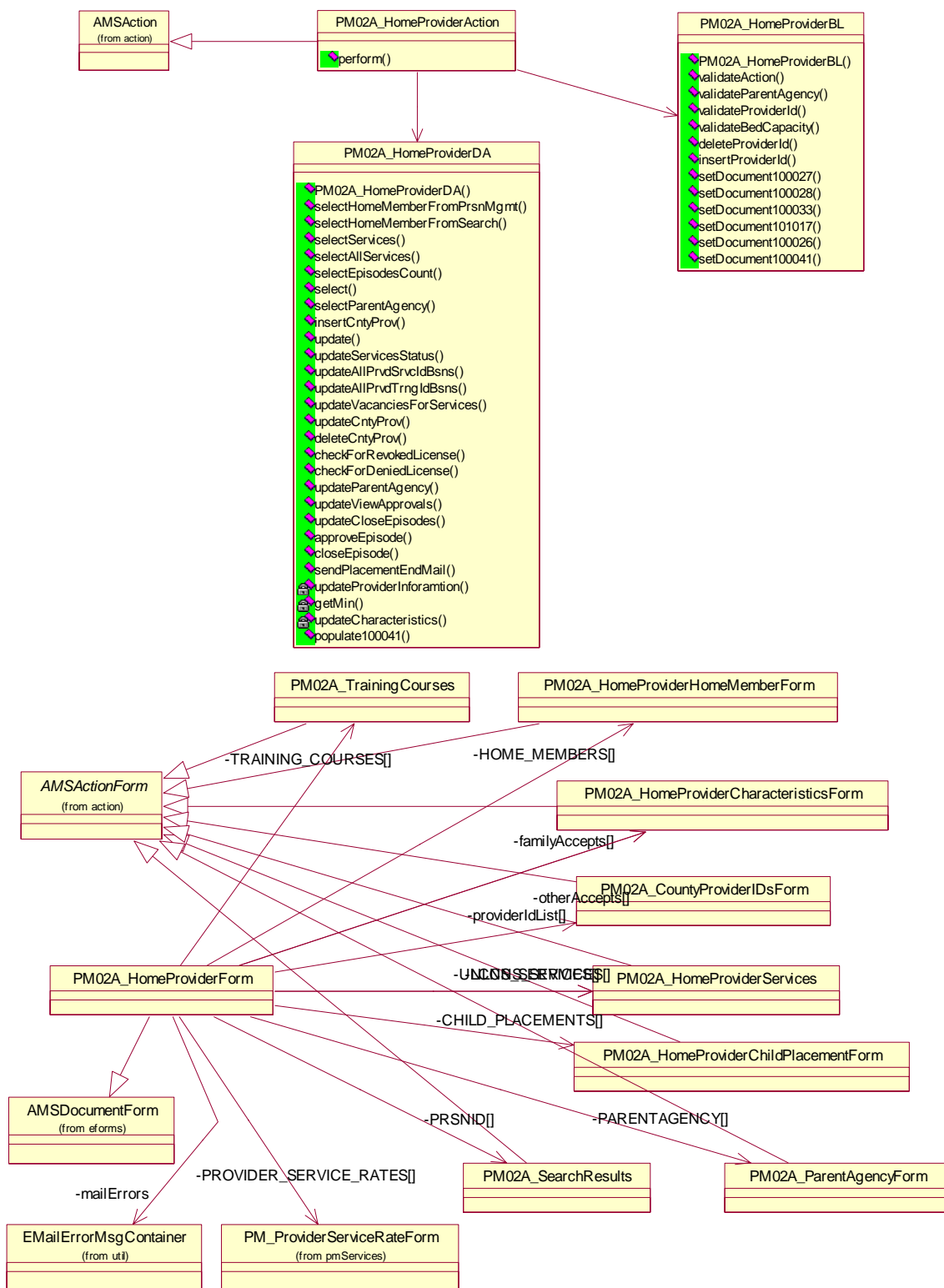
Main Classes involved in Member Status transaction.



Main Classes involved in the Provider Repayment Transactions.



### Main Classes involved in the Home Provider Transactions.



Below is a brief description of each of the Java Classes:

Type	Name	Comment
Action Class	PM02A_HomeProviderAction	Standard Action Class.
Business Logic	PM02A_HomeProviderBL	Standard Business Logic Class.
Data Access	PM02A_HomeProviderDA	Standard Data Access Class.
Form	PM02A_HomeProviderForm	Data Container for Home Provider record. This is the main form holding all the other related Data.
Action Class	PM02A_BedReservationAction	Standard Action Class.
Data Access	PM02A_BedReservationDA	Standard Data Access Class.
Form	PM02A_BedReservationForm	Data container holding the Bed Reservation records. This is the main form and holds all the other relevant data.
Form	PM02A_BedReservationReservations	Sub Form used to hold the Bed reservation Items.
Action Class	PM02A_EditUnlicensedServicesAction	Standard Action Class.
Business Logic	PM02A_EditUnlicensedServicesBL	Standard Business Logic Class
Data Access	PM02A_EditUnlicensedServicesDA	Standard Data Access Class.
Form	PM02A_EditUnlicensedServicesForm	Data Container used to hold the Unlicensed Service records.
Form	PM02A_CountyProviderIDsForm	This is a Sub-form for the Home Provider form. This is a data container holding one County Provider record.
Form	PM02A_HomeProviderCharacteristicsForm	This is a Sub-form for the Home Provider form. This is a data container holding one Home Provider Characteristic record
Form	PM02A_HomeProviderChildPlacementForm	This is a Sub-form for the Home Provider form. This is a data container holding one Child placement record
Form	PM02A_HomeProviderHomeMemberForm	This is a Sub-form for the Home Provider form. This is a data container holding one Home

Type	Name	Comment
		Member record
Form	PM02A_HomeProviderServices	This is a Sub-form for the Home Provider form. This is a data container holding one Home Provider Service record.
Action Class	PM02A_MemberStatusAction	Standard Action Class.
Data Access	PM02A_MemberStatusDA	Standard Data Access Class.
Form	PM02A_MemberStatusForm	Main Data Container used to hold the Member Status data.
Form	PM02A_MemberStatusHistory	This is the sub-form that holds the individual Member status history records.
Form	PM02A_ParentAgencyForm	This is a Sub-form for the Home Provider form. This data container holds one Parent Agency record.
Action Class	PM02A_ProviderRepaymentMethodAction	Standard Action Class.
Data Access	PM02A_ProviderRepaymentMethodDA	Standard Data Access Class.
Form	PM02A_ProviderRepaymentMethodForm	Main Data Container that holds all the necessary data of the Provider Repayment records.
Form	PM02A_SearchResults	This is a Sub-form for the Home Provider form. This data container holds details of one Search Record.
Form	PM02A_TrainingCourses	This is a Sub-form for the Home Provider form. This is a data container holding details of one Training course.
Form	PM02A_UnlicensedServices	This is a Sub-form which holds the details of one particular service.